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Authors' Royalties in 2010: An Unexpected Rebound

**Global Economic Survey of the Royalties Collected
by the CISAC Member Authors' Societies in 2010**

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Introduction



INTRODUCTION (1/2)

In its annual survey, CISAC (International Confederation of Societies of Authors and Composers) analyses the global royalty collections of over 200 authors' societies. This report provides a good picture of the economic situation of creators worldwide and highlights the significant trends in collective management by type of rights, repertoire and geographical region.

In spite of a still challenging economic environment, 2010 was a positive year for creators with a marked increase in copyright royalty collections:

- A new record for global collections with revenues of **€7.5 billion in 2010**;
- A strong rebound in collections in 2010, **up 5.5% on 2009**;
- **Growth in collections recorded in all the regions of the world**;
- Growth driven by **an increase in public performance royalties (+7.5%)** in all sectors and for all repertoires;
- **The mechanical right started to recover slightly**;
- Growth was driven by **musical collections, which increased significantly this year**.

This global collections result reflects the viability of collective management of authors' rights and the solidity of the international network of authors' societies represented by CISAC.

Collective management of authors' rights is a sound system which is able to withstand changes in economic circumstances and creates wealth for creators.

INTRODUCTION (2/2)

With a **rate of growth of collections slightly exceeding that of world GDP** in 2010 (+5.1% according to IMF figures), authors' rights also contribute to global economic development.

The CISAC survey also shows a **steady increase in the societies' collections over the last 7 years** and a doubling of global collections in 15 years (from €3.612 billion in 1995 to €7.545 billion in 2010) – in striking contrast to the figures from other cultural sectors.

Efforts by the authors' societies to reduce their administration costs, combined with constantly expanding coverage of their territories and of the various forms of use of creative works within all the repertoires, particularly in the digital sector, enabled the societies to increase the amount of royalties distributed to right owners in what was still a difficult economic context. This shows that the system of collective management is fit for the 21st century.

CISAC's objective is to support all the authors' societies in order to increase the revenues accruing to creators for the use of their works. To this end, CISAC is committed to developing the global network of authors' societies and ensuring that each society benefits from the best tools for the management and administration of works and rights.

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Key figures for global collections in 2010:

€7.545 billion – total domestic collections of the 232 CISAC member societies in 2010

+5.5% worldwide from 2009 to 2010 (in current €) with a growth in all regions

61% of collections (€4.6bn) were made in Europe

**73% of collections (€5.5bn) were from public performance royalties
(growth in value +7.5% and in market share +1.4 pts from 2009)**

The musical repertoire accounted for 86% of collections (€6.5bn)

A noticeable +15% growth for the audiovisual repertoire

EXECUTIVE SUMMARY (1/3)

This survey provides a detailed analysis of the global royalty collections of the 232 member societies of CISAC (International Confederation of Societies of Authors and Composers) in 2010. The figures presented in it describe the economic situation of creators worldwide and highlight the significant trends by type of rights, by repertoire and by geographical region.

□ Trends in global collections by type of rights

There were several pleasant surprises in 2010:

- **The recovery (+2.7%) of mechanical reproduction royalty collections** (for recorded works), despite the difficulties faced by the recorded music market. While the transition to the digital market is still not sufficient to offset completely the continuing decline in revenues from sales of physical formats, this improvement in 2010 nevertheless reflects an increase in revenues (+22%) from digital channels (streaming and downloads).
- Private copying revenues, after experiencing a downtrend, grew by 20% in 2010, mainly due to exceptional results in Western Europe.
- More predictably, **public performance royalties (for communicating works to the public) increased again this year**, at a much higher rate than the market (+7.5%). These royalties now represent 73% of creators' total revenues. Radio, TV, cable and satellite still generate most of these royalties (56%) and will probably continue to do so for a long time to come. In addition, **the advertising market's growth prospects in the period to 2014 suggest that further increases in performance royalties can be anticipated in the next few years.**

By contrast, **the growth recorded in collections from the digital sector (which account for 1.7% of total collections, all repertoires combined) is still not enough** to provide significant revenues for creators. The growing number of licenses granted by the CISAC member authors' societies to online services for the use of their repertoires combined with the increasingly widespread use of metadata for works should lead to a progressive and more significant improvement in creators' remuneration.

Royalties for reprography declined in 2010 after an exceptional year in 2009 (when a legal decision in Germany resulted in substantial back payments) and lending/rental royalties also marked time after a good performance in 2009.

□ Trends in global collections by repertoire

The **musical repertoire, which represents the lion's share (86%) of the royalties** collected by the collective management societies, saw a strong recovery in growth to total €6.52 billion in 2010.

The other repertoires (audiovisual, dramatic, literary, live entertainment, visual arts), **represented over €1 billion** but recorded slower growth this time (+0.7%):

- The audiovisual repertoire (second after music) grew by 15% in 2010.
- The dramatic repertoire saw renewed growth in 2010, returning to a level comparable to its 2008 one.
- The visual arts repertoire suffered a steep fall (-43%) due to the drop in reprography royalties as explained above.

□ Trends in global collections by region

Despite its subdued growth (+2.3%), Europe, and particularly Western Europe, continues to be the leading region for royalty collections with a contribution of €4.6 billion. Western Europe is also the region with the world's highest collections per head of population.

As in previous years, the trend in the Canada-USA region was very much in line with the world average.

Lastly, several geographical areas were particularly dynamic in 2010, including Oceania (+34%), South-East Asia (+25%) and the whole Latin America-Caribbean region (+21%).

There are two new features in this year's report:

- Updated sub-regional divisions, particularly for Europe which now has two sub-regions (Eastern and Western) instead of four as in the past.
- Introduction of two new indicators relating collections to GDP in order to assess the performance of collective management in comparison to the country's economic and demographic profile. These new indicators factor each country's economic weight into collections.

METHODOLOGY (1/2)

Methodology of CISAC collections survey

- The 2010 collection figures presented in this report are based on the CISAC member societies' **gross national collections**, as freely notified to CISAC at the end of November 2011 (Declaration of Income and Expenditure). These figures correspond to the royalties collected for the use of the global repertoire in their respective territories. Therefore, **international exchanges between sister societies are not covered**. In other words, royalties that the societies may receive for use outside each society's own national territory are excluded.
- If there were any missing or incomplete figures when this report was published, some societies' national collections may have been **estimated** by reference to the figures for the previous year. Certain estimates could prove to be too optimistic or too pessimistic in relation to the actual figures (subsequently notified by some societies) and this could affect the end result for some sub-regions.
- For comparative purposes, the collection figures are calculated in **current EUR**, unless otherwise stated. Therefore, the figures for the previous years were not recalculated based on the value of the Euro in 2010. The **exchange rate** is calculated by reference to the average exchange rate over the whole calendar year. Exchange rate volatility may have an impact on the aggregate results in some sub-regions.

METHODOLOGY (2/2)

Methodology of CISAC collections survey

- The figures presented in this survey cover only the royalties collected by the collective management societies which are CISAC members and thus **do not cover all the royalties** distributed to creators. Hence, for example, the royalties collected directly by music publishers for songwriters and composers (like most synchronisation royalties) do not come within the ambit of the survey.
- The regional division adopted for this survey reflects the territorial remit of the **five CISAC regions** (Africa, Latin America and the Caribbean, Canada/USA, Asia-Pacific and Europe) rather than the regions as defined by the United Nations.
- In order to provide more information, notably on digital market collections, CISAC is continuing to refine the analysis of mechanical reproduction royalties for the musical repertoire with BIEM, the international organisation of societies managing mechanical reproduction and recording rights. However, the compass of collections differs slightly between CISAC and BIEM.
- Each year, the CISAC Secretariat takes a number of steps to improve the quality of the data and urges its members to communicate their detailed collection figures to it through the CISAC website as early as possible.



1. General Data on Global Royalty Collections in 2010

GENERAL DATA

Analysis (1/2)

► **2010 was a new record year** for royalties collected by the CISAC member societies in their respective territories.

Collections topped the €7.5 billion mark for the first time in 2010. The **5.5% growth rate** clearly confirms the rebound observed the previous year following a difficult year in 2008 due to the global economic crisis.

However, this excellent result needs to be somewhat qualified: exchange rate variations had a significant impact because most currencies strongly depreciated against the Euro which remained high. Nevertheless, at a constant exchange rate level (i.e. retaining currencies' 2009 exchange rates against the Euro), the market still progressed (by over 1%).

With collection growth exceeding that of world GDP (+5.1%), collective management of authors' rights showed once again its excellent resilience to economic swings and its relevance in the digital age, even if it obviously benefited from the economic recovery, and notably the advertising market's renewed health. This solidity is largely due to the diversity of the types of royalties collected and the societies' ability to offset any declines recorded in certain sectors.

There is still significant room for progress particularly in the digital sphere. This offers opportunities for growth in the coming years despite the possible negative effects of the changing economic paradigm and of technological transformations.

GENERAL DATA

Analysis (2/2)

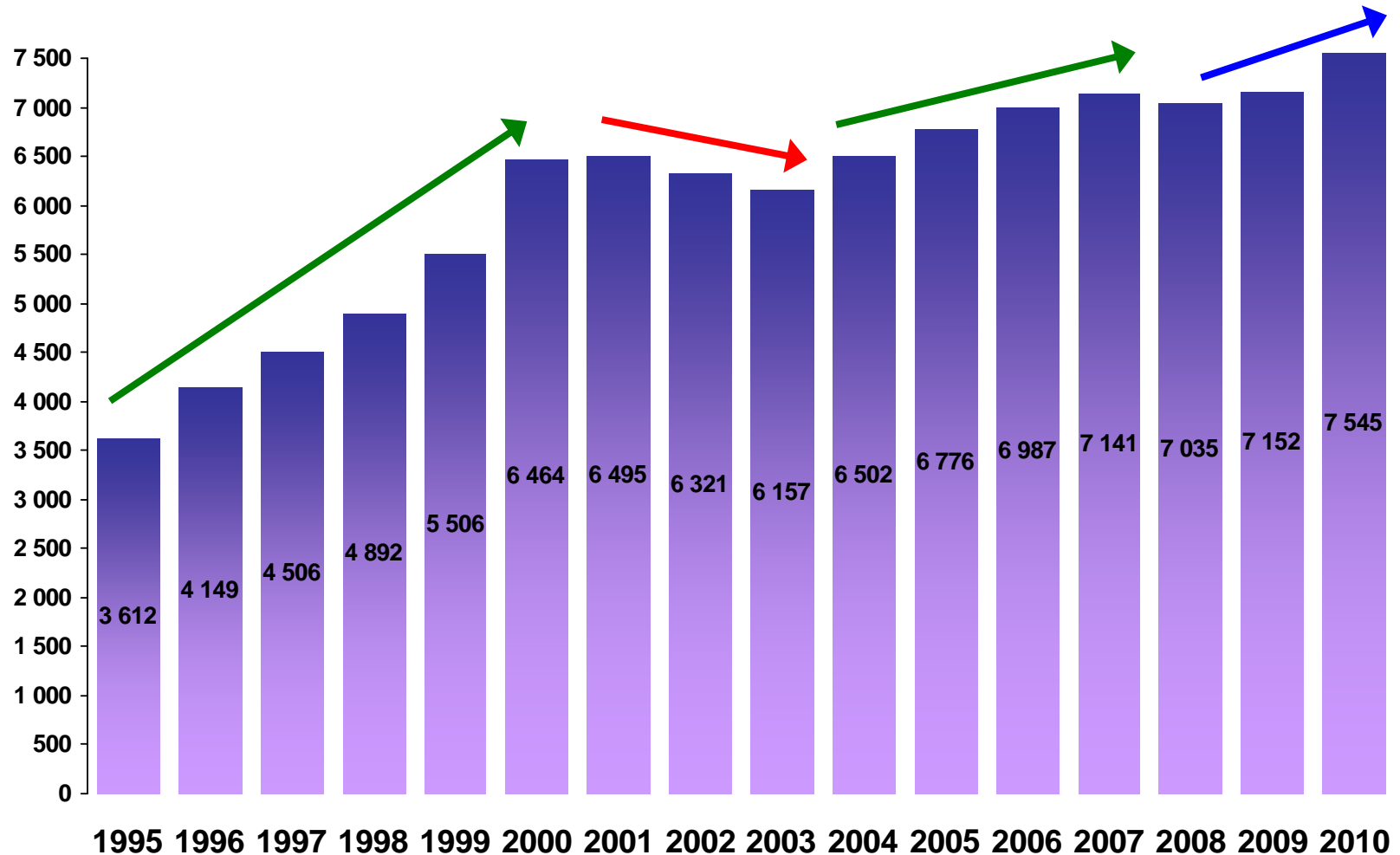
It should be noted, moreover, that **all the regions saw an increase in their collections:**

- **Exceptional results in Latin America and Asia**, with both continents recording double-digit growth of +21% and +12% respectively compared to 2009.
- More moderate growth in North America (+5.7%), Africa (+4%) and Europe (+3%).
- **Europe's share decreased by 1.7% in 2010 to 61% of global collections** to the benefit of the other regions. Asia now represents 15% of global collections and Latin America 4%. With growth slightly above the global average, the **Canada-USA** region has seen its share remain stable year after year at around 19%.

TREND IN GLOBAL COLLECTIONS

World – Millions of €

A new peak has been reached in 2010 for collections

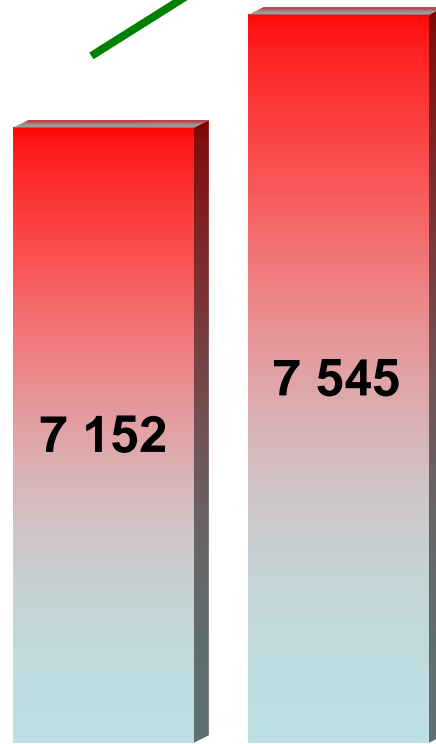


TREND IN GLOBAL COLLECTIONS

World – Millions of €

In current €

+5.5%

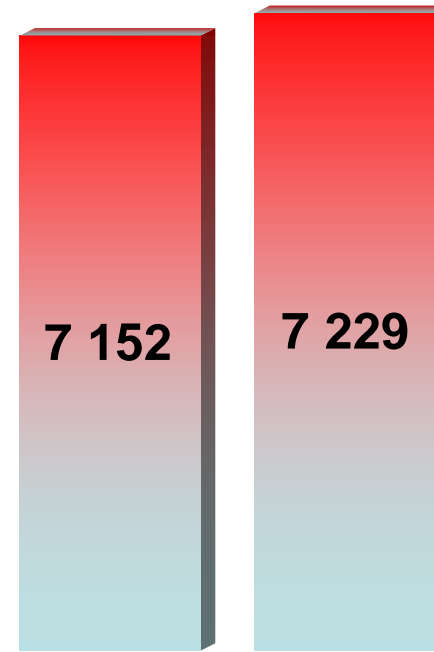


2009

2010

In 2009 (constant) €

+1.1%



2009

2010

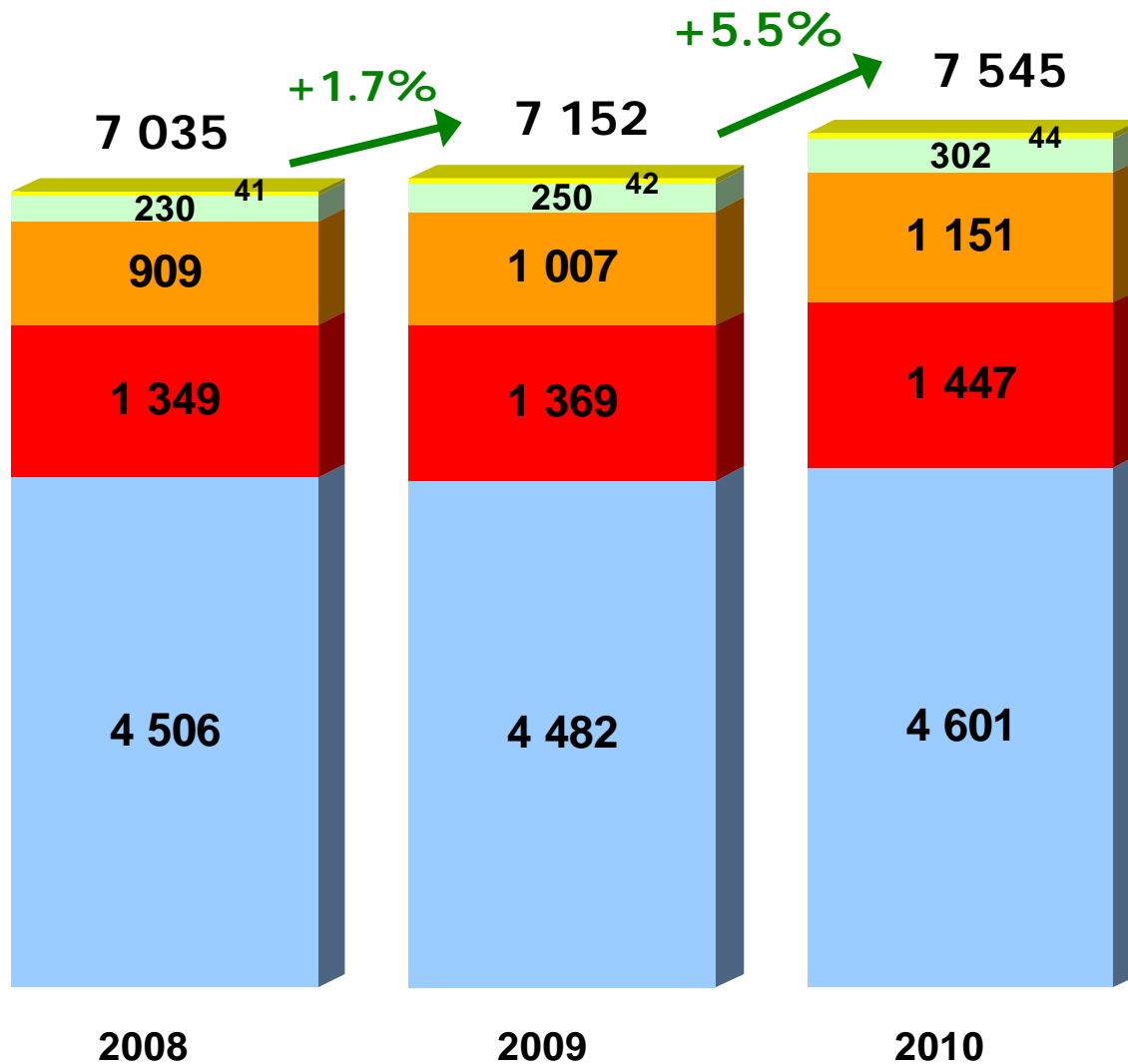
TREND IN THE MAIN EXCHANGE RATES

2010/2009

Country	Currency Code	Local Currency vs €
AUSTRALIA	AUD	-18,6%
SOUTH AFRICA	ZAR	-16,8%
BRAZIL	BRL	-15,8%
CANADA	CAD	-14,0%
KOREA, REP.	KRW	-13,4%
CHILE	CLP	-13,1%
MEXICO	MXN	-10,8%
SINGAPORE	SGD	-10,6%
JAPAN	JPY	-10,6%
PERU	PEN	-10,5%
SWEDEN	SEK	-10,1%
ISRAEL	ILS	-9,4%
RUSSIA	RUB	-8,7%
SWITZERLAND	CHF	-8,4%
NORWAY	NOK	-8,3%
POLAND	PLN	-7,7%
TURKEY	TRY	-7,6%
CHINA	CNY	-5,7%
USA	USD	-4,8%
ARGENTINA	ARS	-4,8%
CZECH REP.	CSK	-4,5%
UNITED KINGDOM	GBP	-3,7%
HUNGARY	HUF	-1,9%

TREND IN COLLECTIONS BY REGION

World – Millions of €



Africa

Latin America-Caribbean

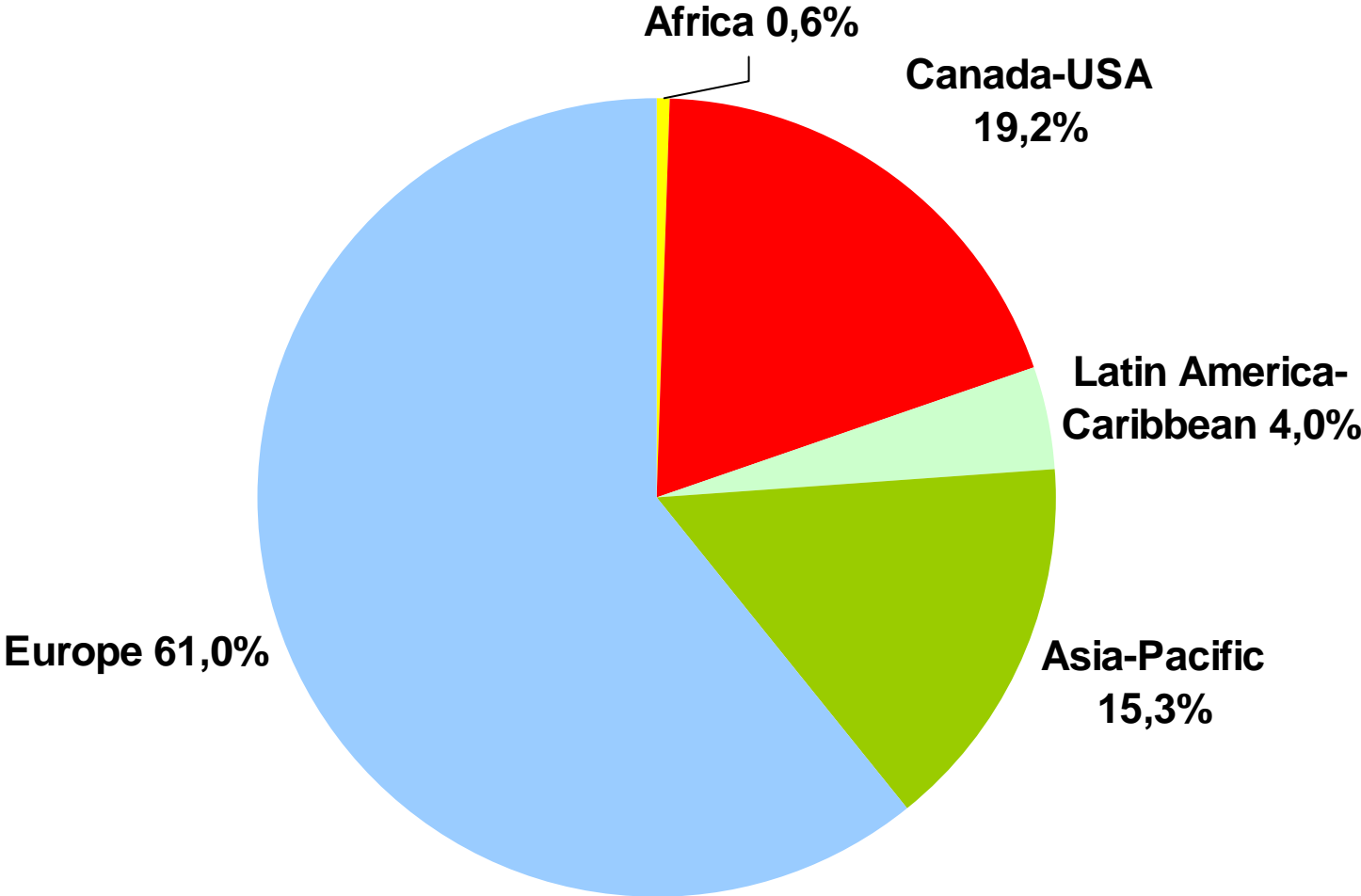
Asia-Pacific

Canada-USA

Europe

RESPECTIVE SHARES OF THE REGIONS

2010 – World – % of collections





2. Analysis by Type of Rights

A. Overview

COLLECTIONS BY TYPE OF RIGHTS

Analysis (1/2)

► **Global growth in copyright royalty collections was mainly due to the increase in public performance royalties (€5.5 billion and 73% of the total) but also to a return to growth in mechanical royalties** after several consecutive years of decline.

Indeed, public performance royalties represent by far the largest contribution to creators' remuneration in all the regions of the globe, if not virtually the sole source in some regions, like Latin America.

Contrary to all expectations, mechanical reproduction royalties increased in 2010 (+2.7%), thanks to the results in North America, Asia and Latin America. In these regions, collections rose by 8-10%.

Among the other types of rights, **private copying recorded aggregate growth** of 20%, mainly generated in Europe. By contrast, reprography – after enjoying an exceptional increase in Europe in 2009 due to the settlement of back payments – and lending/rental declined in 2010. **Lastly, the “other rights” category posted a sharp drop overall (-4.7%) as a result of the lower collections for reprography,** which the growth in collections for the other rights was not sufficient to offset.

COLLECTIONS BY TYPE OF RIGHTS

Analysis (2/2)

Radio and television hold a predominant place as the media that generate the most royalties, both worldwide and in each of the regions. These mass media account for about half of all collections in some geographical areas (Africa, North America).

Note also the significant share (11.8%) represented by cable and satellite throughout America. Video and cinema generate sizeable collections (12%) in Asia.

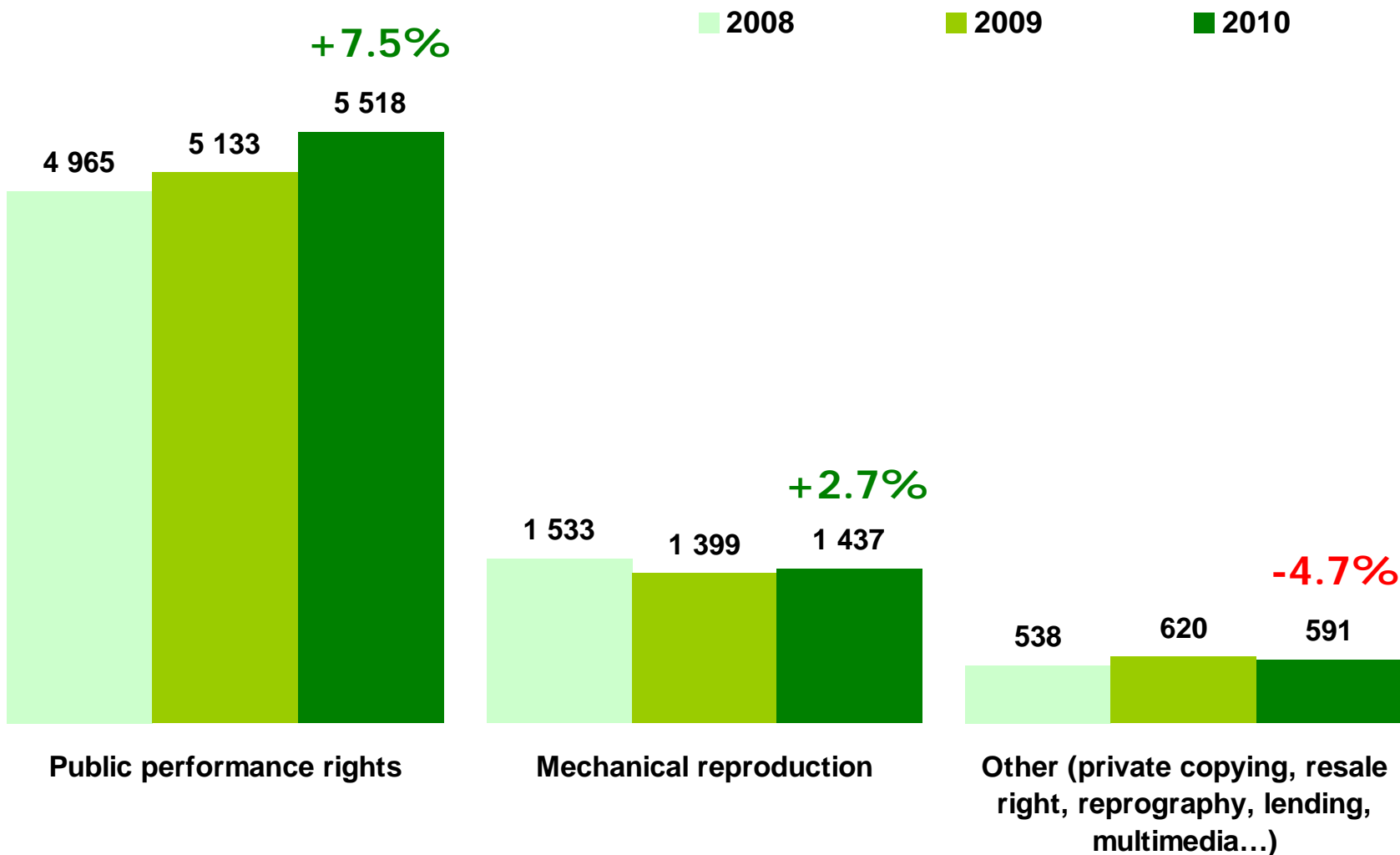
The phonographic industry continues to be a major source (the second) of royalty collections, particularly in Europe, despite the difficulties faced by the recorded music market. It accounts for almost a quarter of total collections (23.4%).

Live entertainment (music, theatre) represented 10% of global collections in 2010, thus a very similar share to that of 2009. It is particularly significant in Latin America (25%) and Europe (14%).

Revenues from digital services continued to be low (1.7% of collections) and showed almost no structural change in relation to 2009.

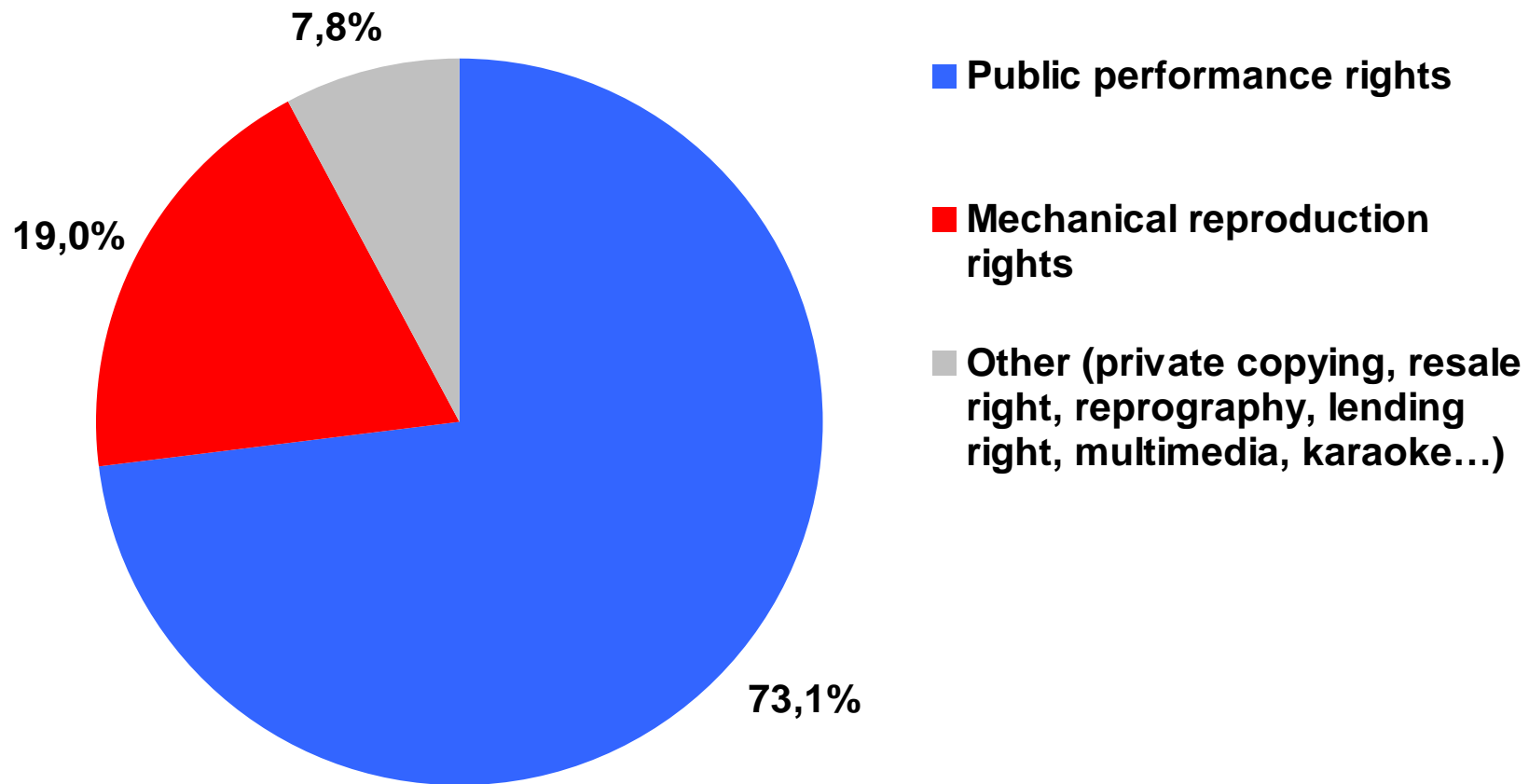
TREND IN COLLECTIONS BY TYPE OF RIGHTS

World – Millions of €



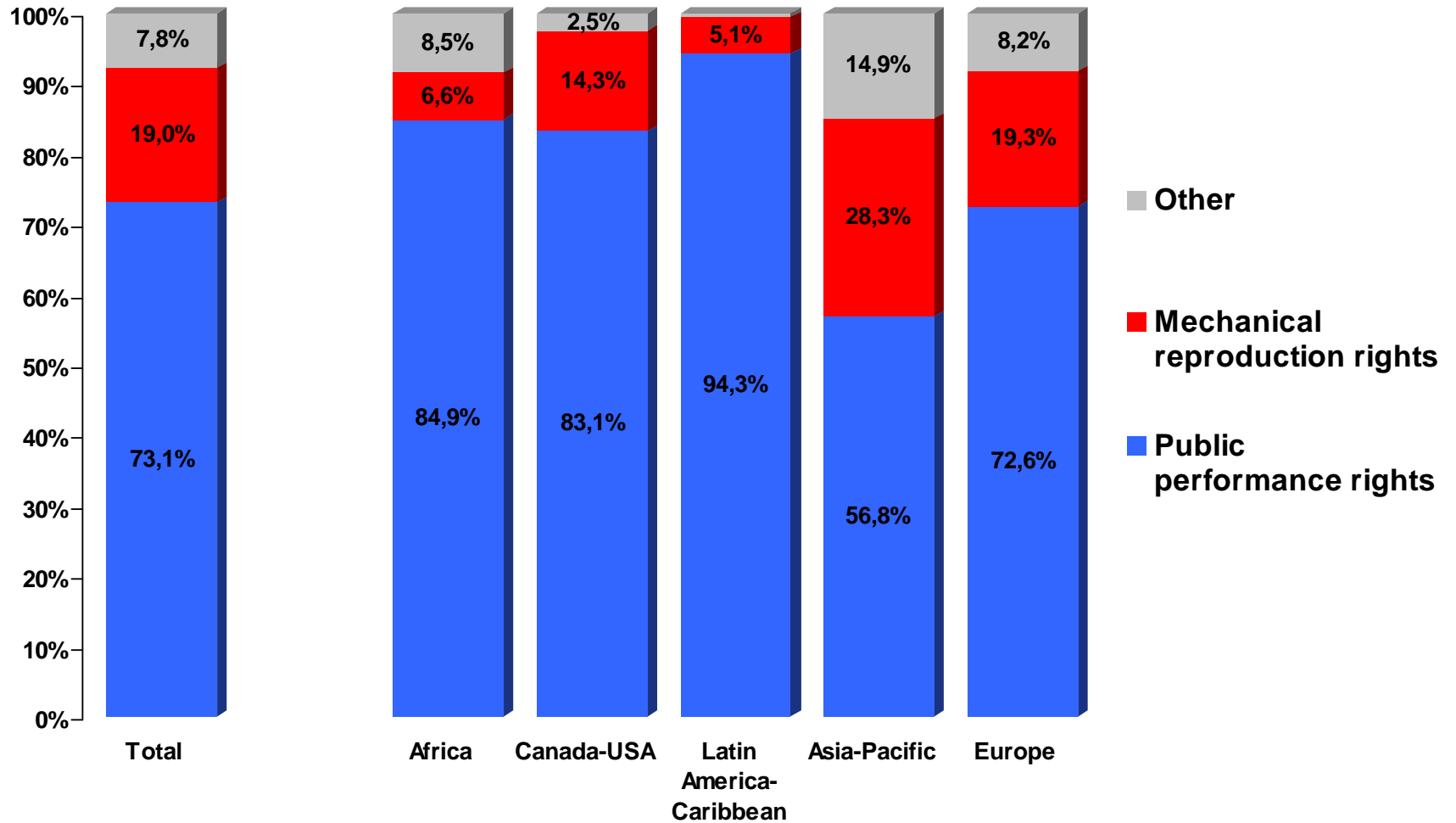
SHARES BY TYPE OF RIGHTS

2010 – World – % of collections



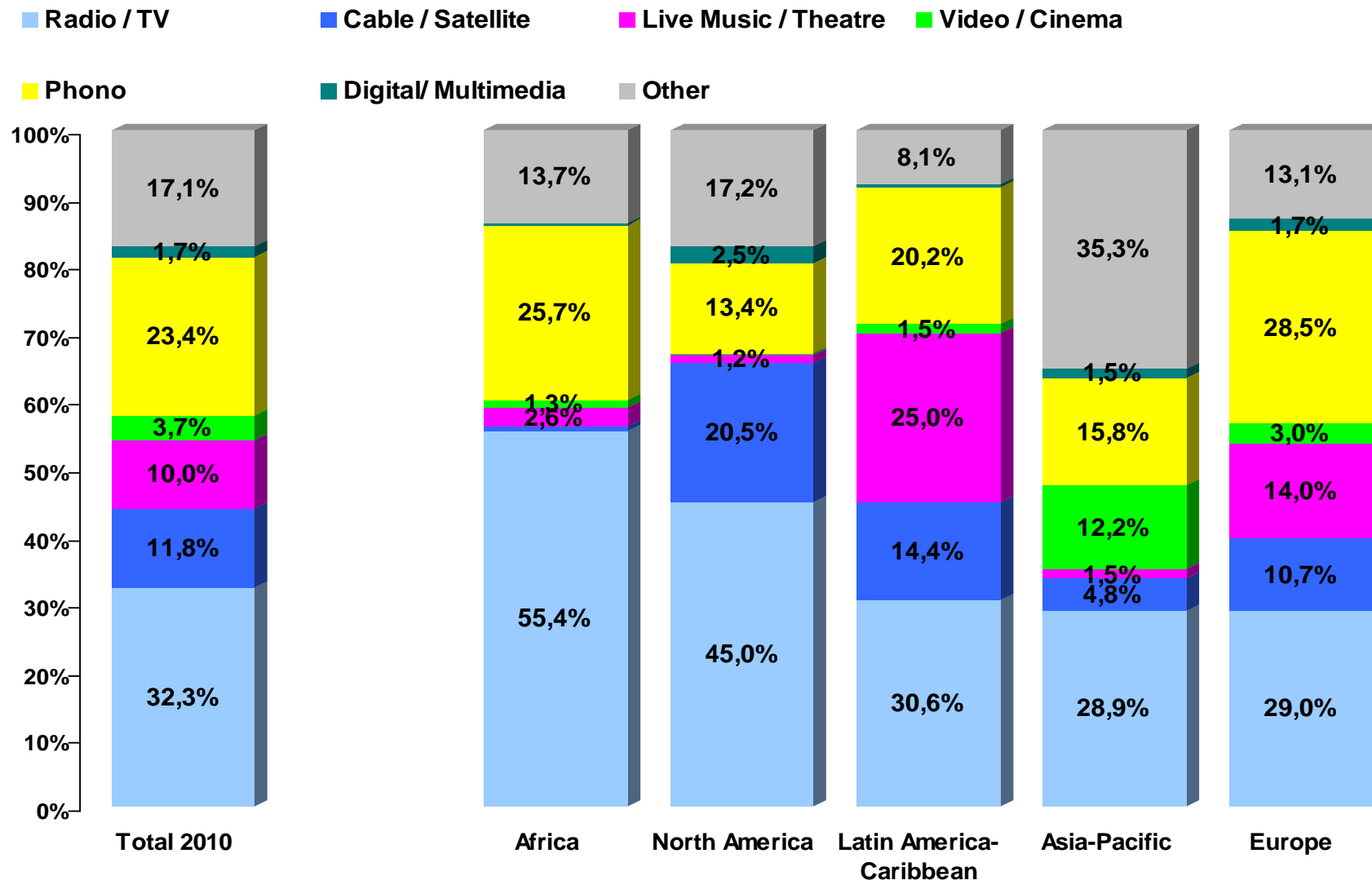
TYPES OF RIGHTS BY REGION

World – % of 2010 collections



ORIGIN OF THE COLLECTIONS BY REGION

% of 2010 collections





2. Analysis by Type of Rights

B. Performing Rights with perspectives on the advertising market

OUTLOOK FOR PERFORMING RIGHTS

Analysis (1/2)

► General growth in the advertising market over the coming years

Performance royalties are generated for the most part by the audiovisual media and are largely financed by advertising. Radio, television (40% for these two alone), cable and satellite represent the bulk of performance royalties. Therefore, it is of interest to take a look at the advertising market in order to anticipate trends in these royalties over the coming years. However, as the advertising market is very cyclical, the forecasts published by specialist agencies are frequently revised, making it necessary to monitor them regularly.

The last reported growth prospects suggest a positive impact on royalty collections over the next few years. So **all the regions of the world should see their advertising revenues increase in the period to 2014** (+20% overall), with particularly strong growth expected in Eastern Europe, Asia-Pacific and Latin America. Indeed, most of the future growth will be generated by the ten main emerging countries, including the BRICs.

However, the leading agencies have recently reduced their growth forecasts for 2012 due notably to weak economic activity in Western Europe (eurozone crisis).

OUTLOOK FOR PERFORMING RIGHTS

Analysis (2/2)

As to the breakdown of advertising expenditure, the mix per media sector is expected to show the following trend:

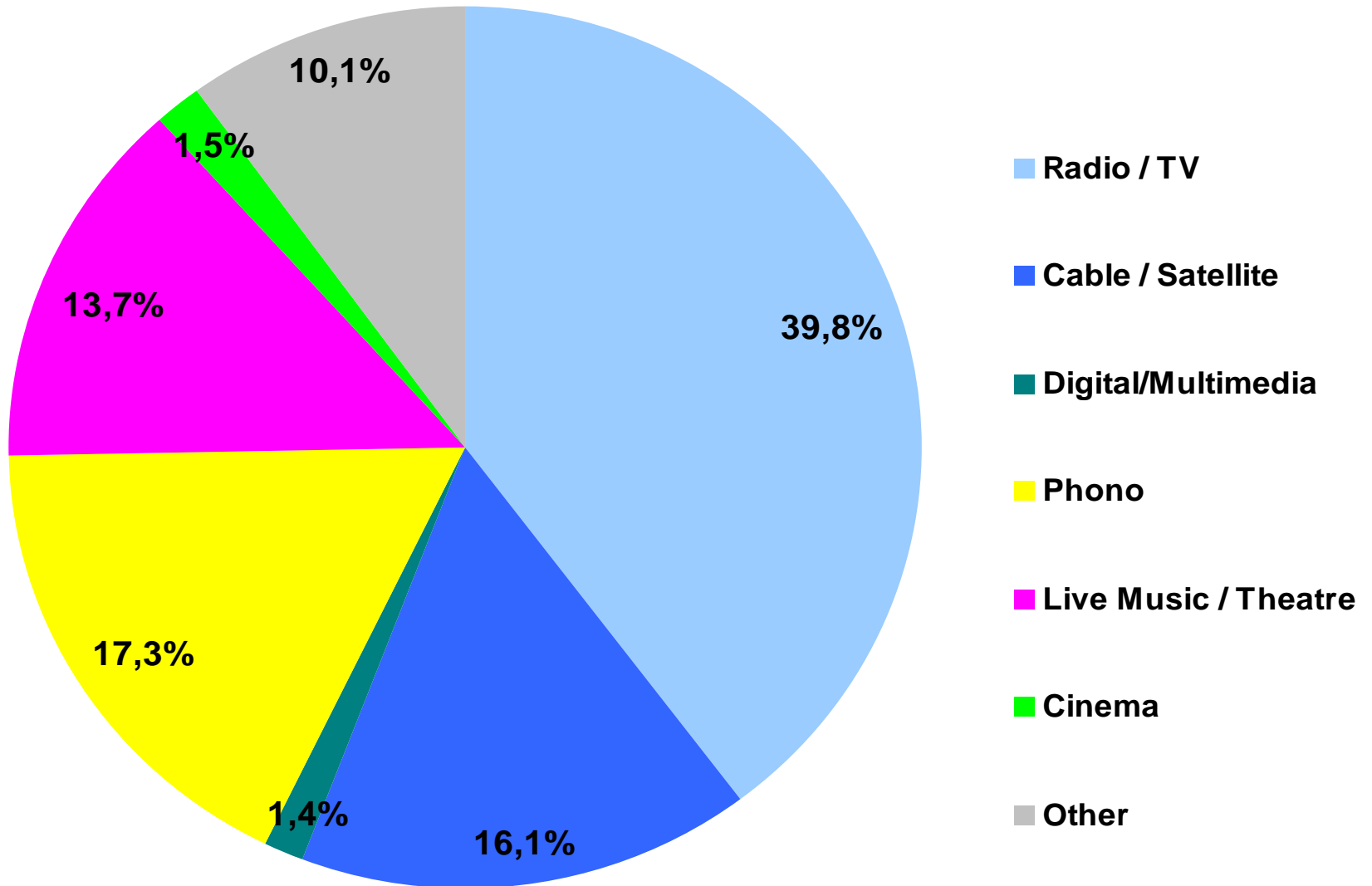
- Television should remain the number 1 medium, with a share of about 40% of advertising expenditure;
- The Internet will gain an increasingly significant market share, mainly at the expense of the press (magazines and newspapers);
- Radio's share will tend to decline slightly.

Therefore, based on these forecasts, a further increase in performance royalties can be expected in 2011 and after.

Accordingly, the authors' societies should strive to make the most of Internet growth as well as consolidating their position in the emerging countries. These are two important and complex challenges for the coming years.

ORIGIN OF PUBLIC PERFORMANCE ROYALTIES

World – % of 2010 collections



LATEST TRENDS OF THE GLOBAL ADVERTISING MARKET

Outlook for performing rights 2011 and beyond

- *ZenithOptimedia's latest forecast (as of December 2011):*
 - +3.5% in 2011 to \$449 billion**
 - +4.7% in 2012**

The internet continues to grow much faster than any other medium, at an average of 15.9% a year between 2011 and 2014. Display is the fastest-growing segment, growing by 18.9% a year, driven mainly by online video and social media. Streaming video ads are burgeoning extremely quickly, thanks to the emergence of do-it-yourself tools that have allowed local advertisers to enter the market. In most developed markets, social media sites are near the top of the list of most-popular websites, and they are often way ahead of their rivals in time spent by users. Other display publishers are developing new tools and formats to compete with social media sites. Paid search is growing by 15.7% a year, but its growth is being slightly restrained by the shift in search behaviour from desktop to mobile devices, where costs are currently lower. Online classified is growing relatively slowly, by 9.2% a year, while employment and property markets remain weak in the biggest countries.

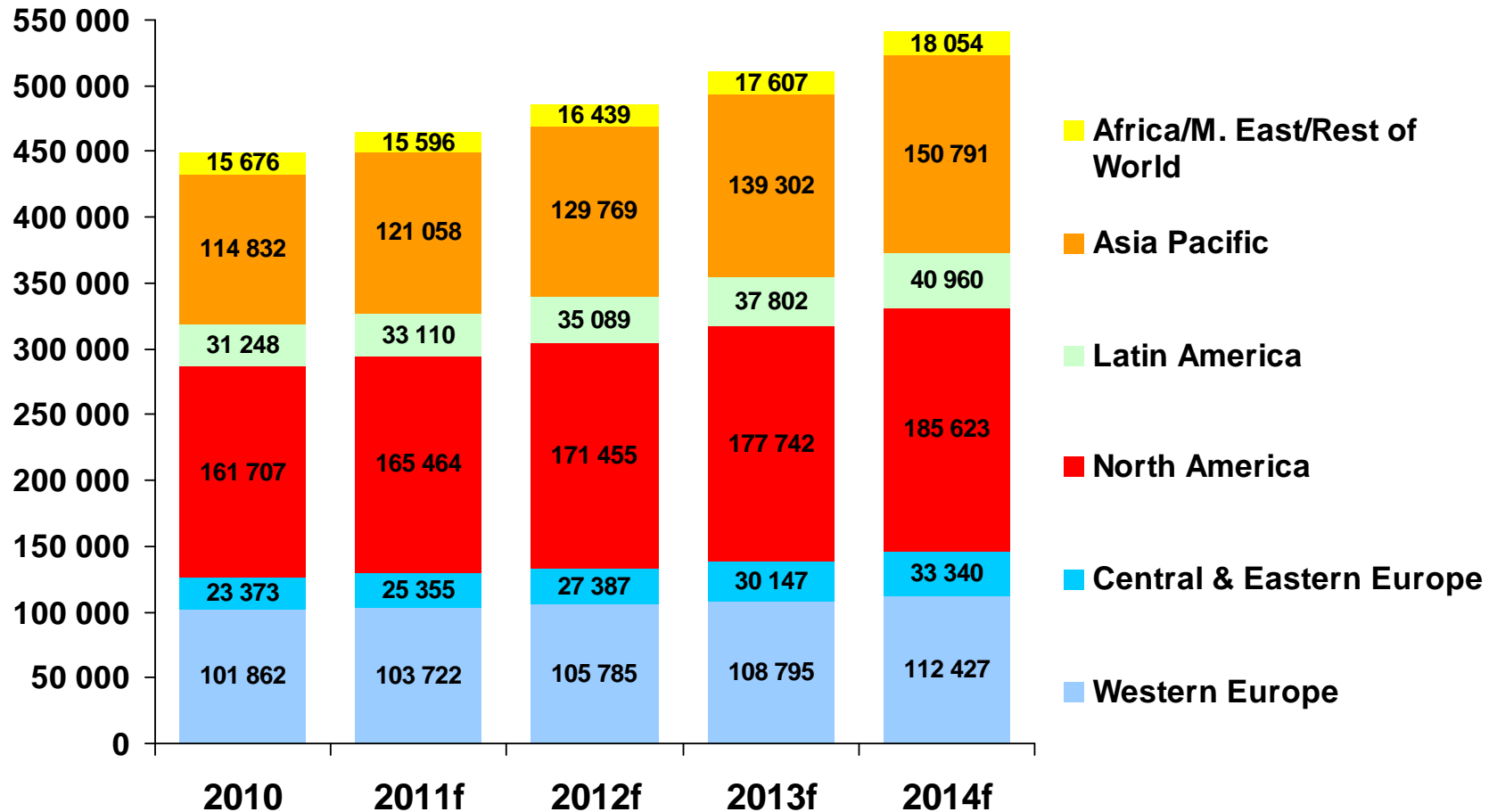
- *GroupM's forecast (as of December 2011):*
 - +5% for 2011 to \$490 billion (vs. \$467 billion in 2010) – Digital media +16%**
 - +6.4% for 2012 – Digital media +16%**
- *Carat's (Aegis group) latest forecast (as of December 2011):*
 - +5% in 2011**
 - +6% in 2012**

LATEST TRENDS OF THE GLOBAL ADVERTISING MARKET

Outlook for performing rights 2010 and beyond

US\$ million at current prices
(currency conversion at
2010 average rates)

Global advertising expenditure by region - major media



Source: ZenithOptimedia (as of December 2011)

LATEST TRENDS OF THE GLOBAL ADVERTISING MARKET

Outlook for performing rights 2011 and beyond

Top ten ad markets

US\$ million, current prices. Currency conversion at 2010 average rates.

2011		Adspend	2014		Adspend
1	USA	154,935	1	USA	173,165
2	Japan	45,358	2	Japan	48,825
3	China	29,943	3	China	46,381
4	Germany	24,419	4	Germany	26,005
5	UK	18,355	5	UK	20,345
6	Brazil	15,470	6	Brazil	18,442
7	France	12,823	7	France	13,827
8	Australia	11,417	8	Australia	13,035
9	Canada	10,529	9	Russia	12,592
10	Italy	10,040	10	Canada	12,458

Source: ZenithOptimedia

Beyond the BRICs: the next wave of emerging ad markets

Adspend growth (2014 v 2011)

US\$ million, current prices. Currency conversion at 2010 average rates.

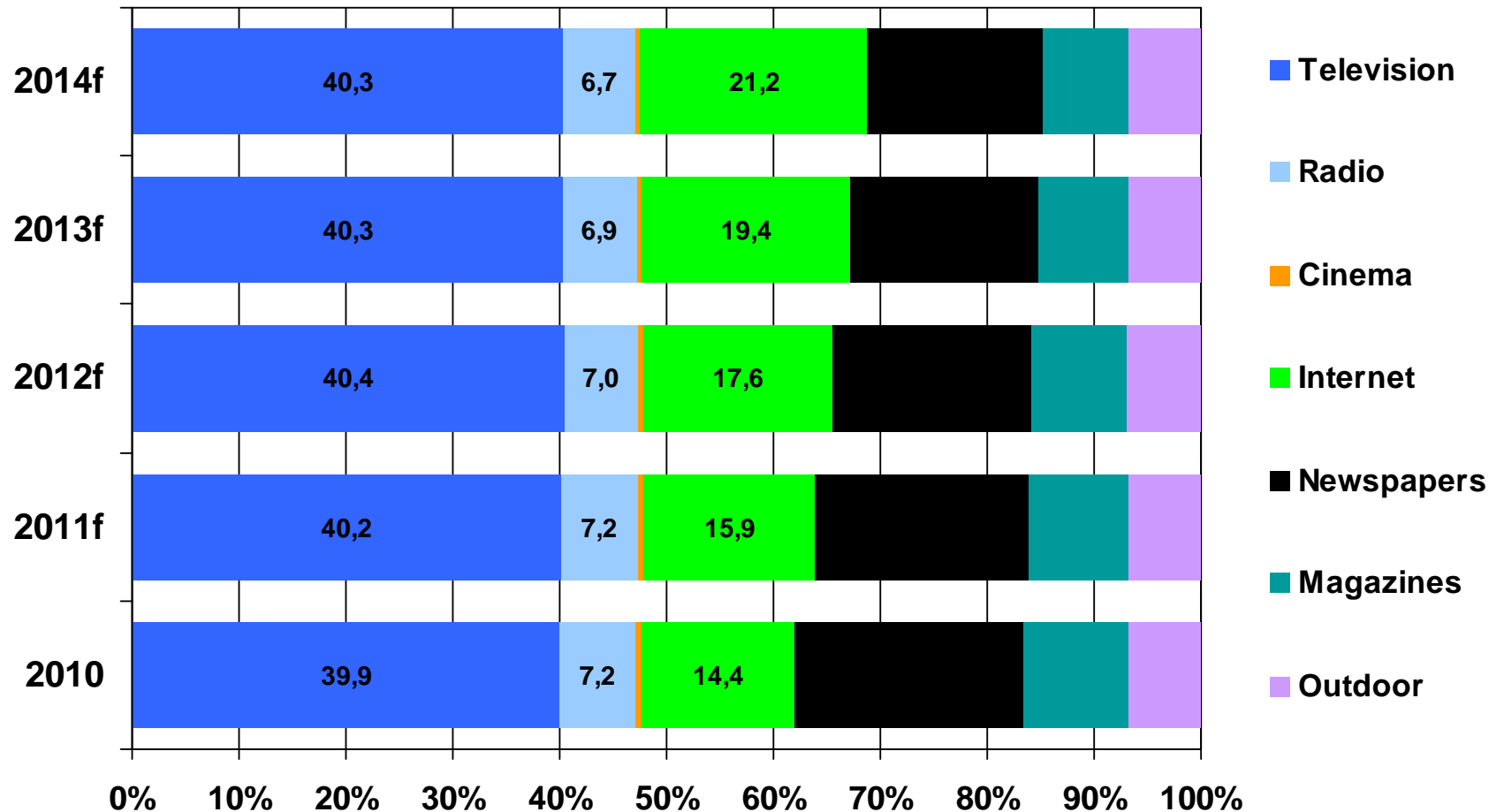
		Adspend growth
1	China	16,439
2	Russia	4,418
3	Indonesia	3,768
4	Brazil	2,972
5	South Africa	2,050
6	Argentina	1,812
7	India	1,571
8	Turkey	1,435
9	Mexico	1,092
10	South Korea	1,016

Source: ZenithOptimedia (as of December 2011)

LATEST TRENDS OF THE GLOBAL ADVERTISING MARKET

Outlook for performing rights 2010 and beyond

Global share of advertising spend by medium (%)





2. Analysis by Type of Rights

C. Mechanical Rights with perspectives on the music market

MECHANICAL RIGHTS

Analysis

► A fragile recovery of mechanical reproduction royalties (€1.702 billion in 2010, +5% in relation to 2009)

In relation to 2009, there are few changes to note in the structure of the sources of these collections apart from a slight increase in the Video category (+1pt) and a drop in the Phono category (-1.2 pts). The decline in record sales continues to affect mechanical royalties, without being sufficiently offset by revenues from the digital sector, which still represents only a small share (3.6%).

According to IFPI, global recorded music sales declined in value by 8.4% in 2010: sales of physical formats fell by 14.2% while digital sales rose by 5.3% (29% of revenues). It should be noted that the record industry is collecting more and more performance royalties which now account for 5% of its total revenues. Although the main traditional music markets are suffering (USA, Japan), the emergence of Asian countries (India, South Korea), which are seeing strong growth, should be stressed.

Further indications have been provided by BIEM:

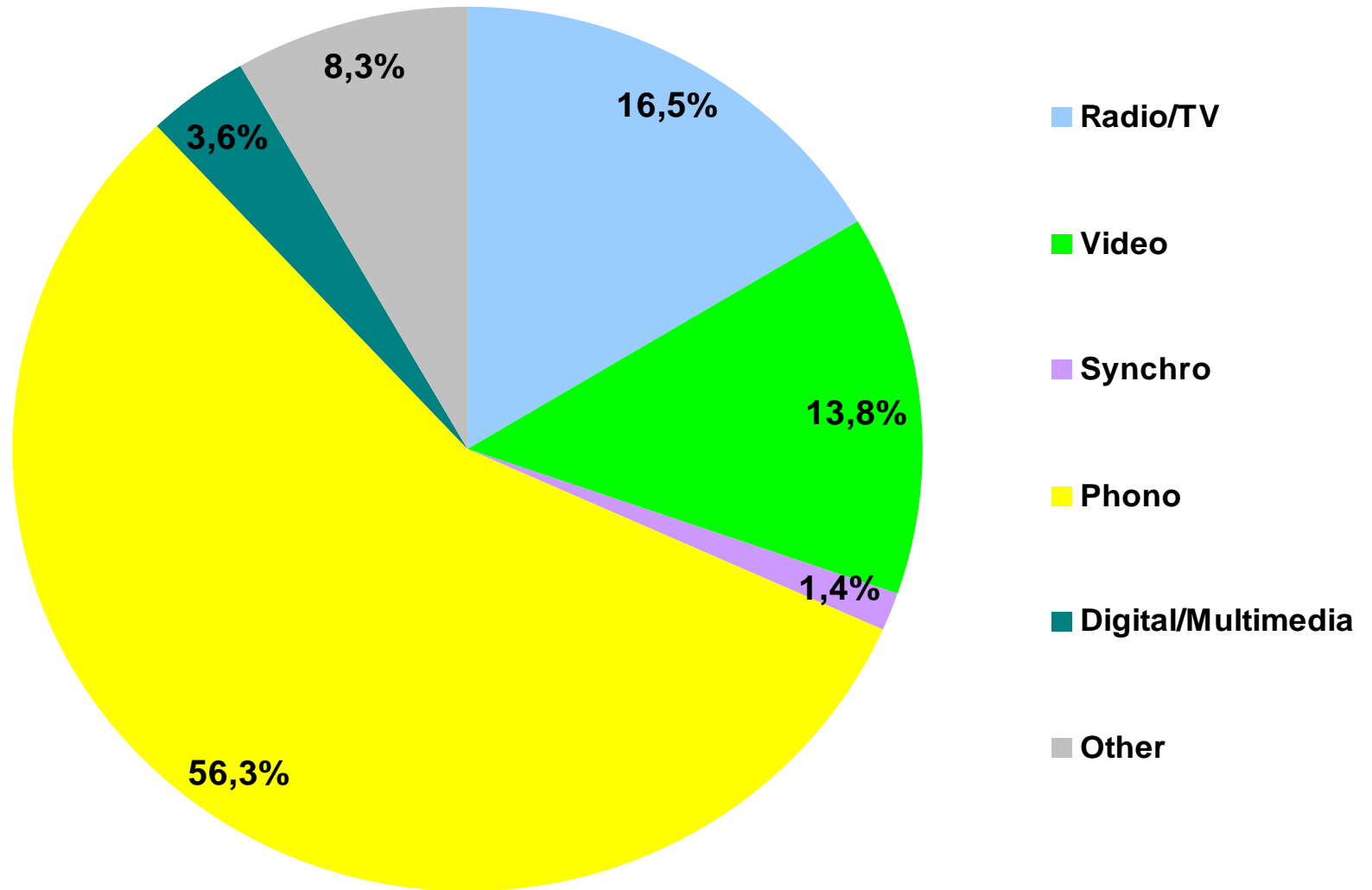
"The positive results in 2010 should not be considered overoptimistically because of the stable figures (for the first year since 2005) for phonographic collections. In addition, a more favourable exchange rate in 2010 than in 2009 accentuated the slight growth in the American region, thus offsetting the decline in Asian collections (Japan).

The Video sector came out well with a double-digit growth rate, as did private copying (collections for private copying in Germany increased 9-fold in 2010 following the agreement concluded in early 2010 with the association of computer manufacturers setting the remuneration from 2002 to the end of 2010).

In the online sector, the growth rates for streaming and downloads were very high (+45% and +30% respectively), reflecting the expansion of licensing contracts for these two types of music use. Telephone ringtones continued to decline. Taken as a whole, online collections (€172 million, thus €32 million for streaming and €99 million for downloading) accounted for only 10% of total mechanical royalty collections."

ORIGIN OF MECHANICAL REPRODUCTION ROYALTIES

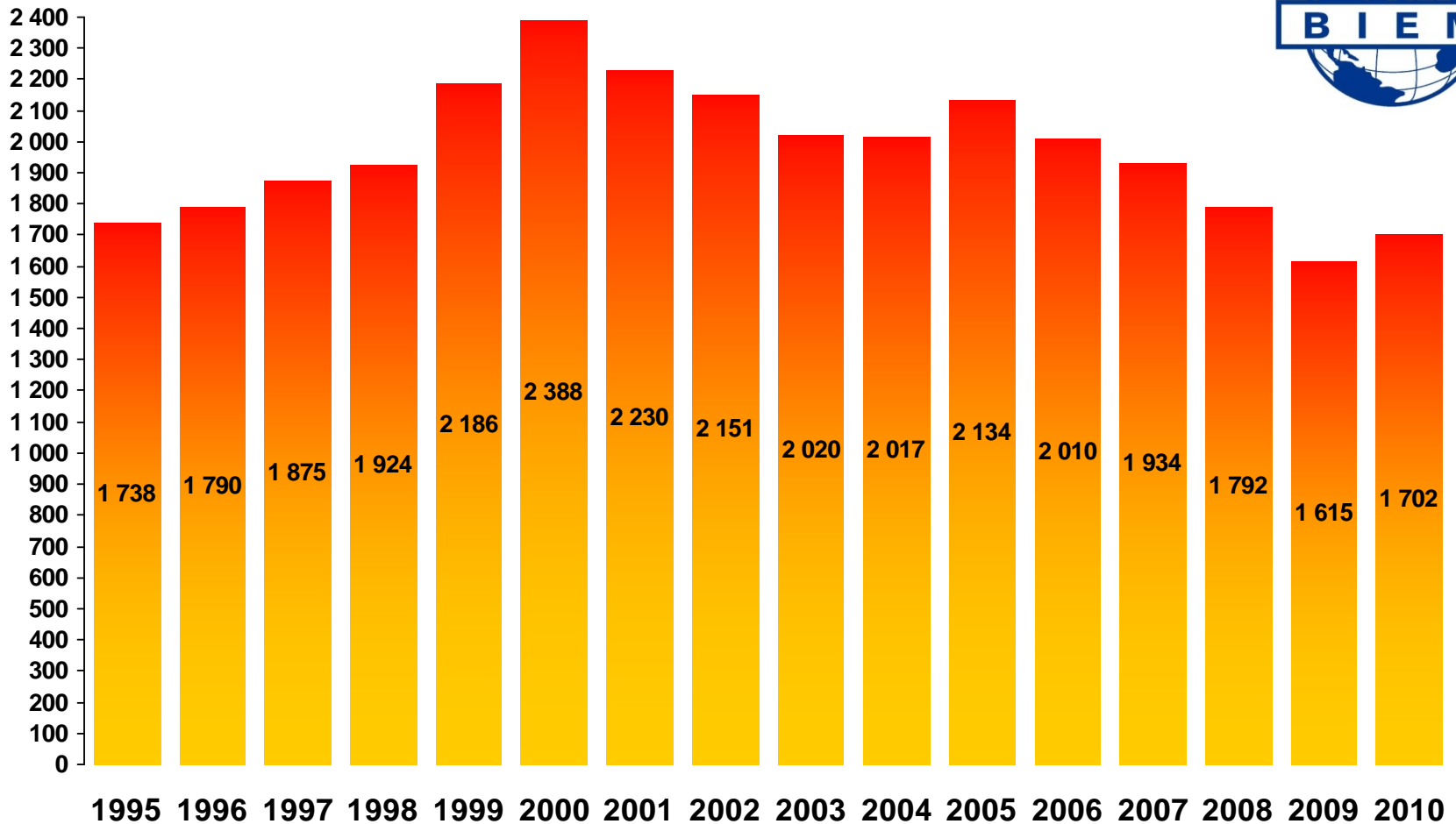
World – % of 2010 collections



TREND IN MECHANICAL ROYALTIES – MUSIC

BIEM figures – World - Millions of €

A rebound for music mechanical rights collections in 2010





3. Analysis by Repertoire

COLLECTIONS BY REPERTOIRE

Analysis

► Clear upturn for the musical repertoire

The musical repertoire (€6.5 billion) drove up copyright royalty collections in 2010 with its strong growth (+6.3%), after suffering the effects of the crisis in 2008 (-3%) then starting to recover in 2009 (+0.3%). This repertoire represents 86% of global collections and posted growth in all the CISAC regions.

The other repertoires – totalling over €1 billion – grew on the whole but to a lesser extent (+0.7%) and above all with contrasting trends between repertoires.

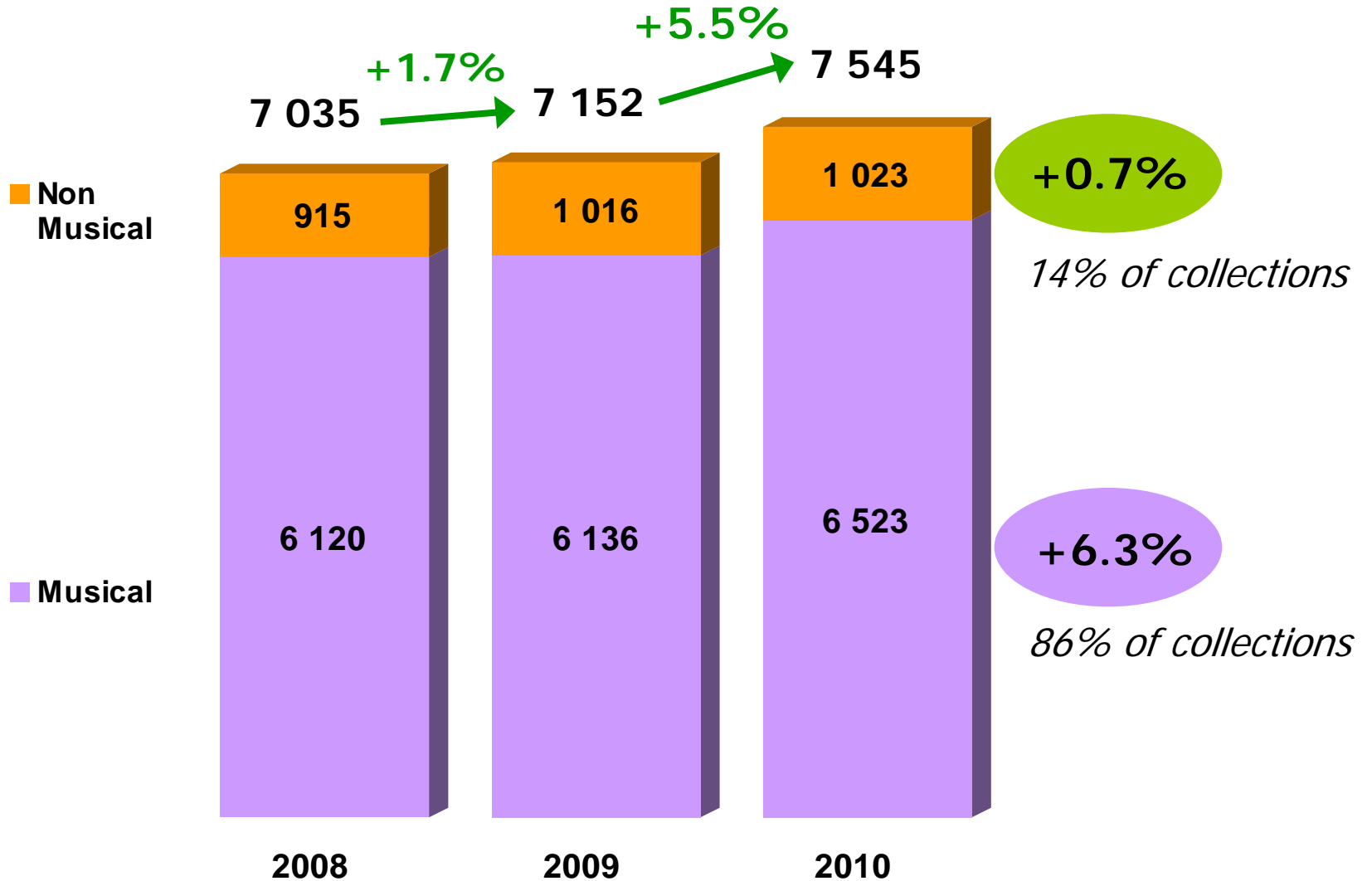
Indeed, the audiovisual repertoire experienced double-digit growth of almost 15%; its growth is maintained year after year. Again, this repertoire grew in all the regions, sometimes spectacularly (+52% in Latin America), but Europe accounts for the lion's share of audiovisual collections (90%).

The dramatic repertoire also had a satisfactory year in 2010 with collections up 8%.

By contrast, the result for the visual arts repertoire was disappointing in 2010 (-43%). This trend can be attributed to the drop in royalties for reprography, as explained in the previous section.

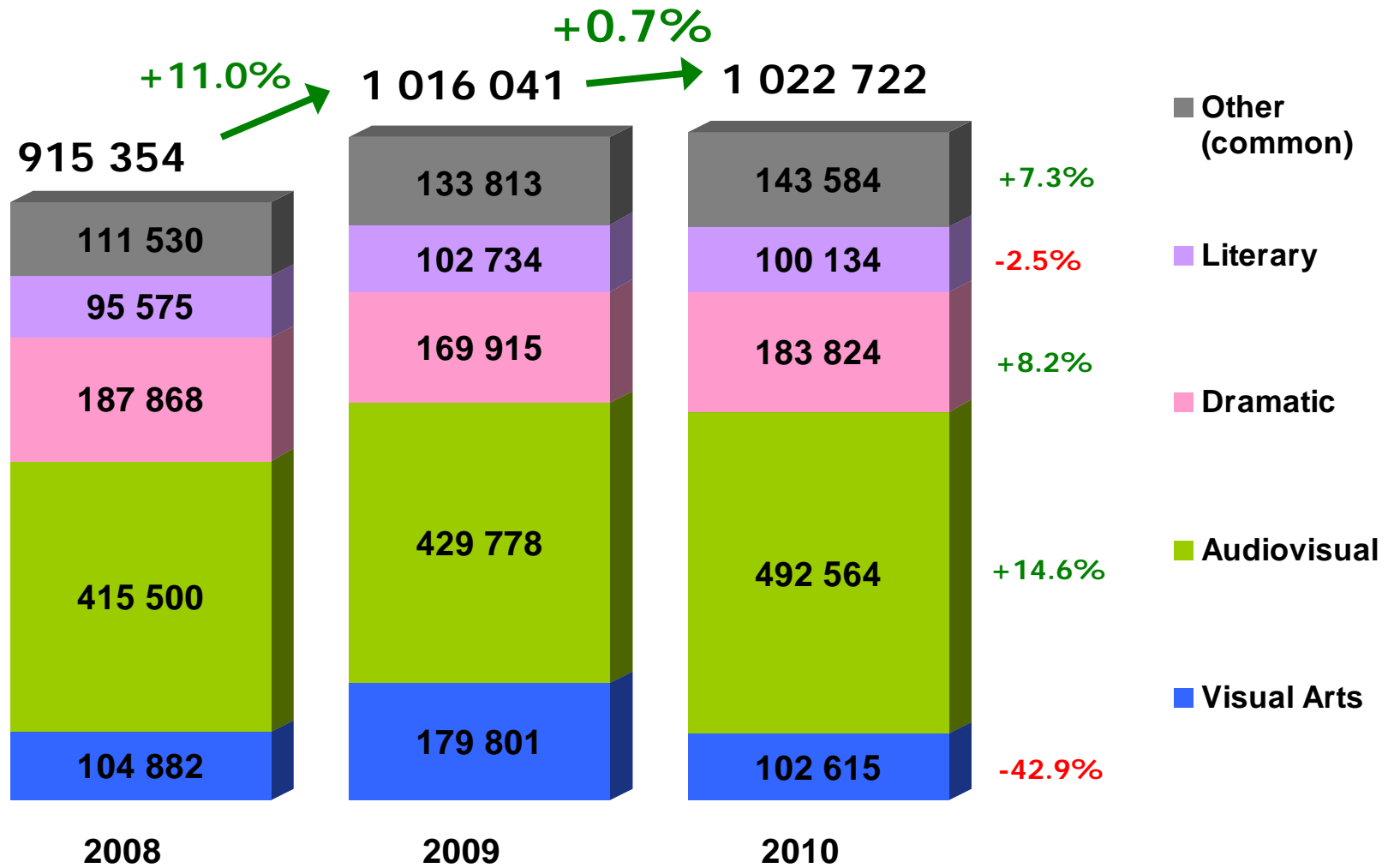
TREND IN COLLECTIONS BY REPERTOIRE

World – Millions of €



TREND IN COLLECTIONS - EXCLUDING MUSIC

World – Thousands of €





4. Analysis by Geographical Area

COLLECTIONS BY GEOGRAPHICAL AREA

Analysis (1/2)

► **Western Europe represents over half of global collections (57%)**

Western Europe continues to dominate the copyright royalty market even though it experienced weak growth in 2010 (+2.3%), equivalent to that of the previous year and less than the global average. At the same time, this positive figure has a considerable impact on the trend in global royalty collections.

It is also the geographical area in which the average annual collections per head of population are the highest (exceeding €10 per capita a year): more than seven times higher than the international average which also increased slightly in 2010. Indeed, the countries holding the top thirteen places for this indicator are all in Western Europe, followed by Japan and Canada, the only other countries with per capita collections exceeding €7.

Eastern Europe, after experiencing a decline in 2009, returned to growth (+7.3%) but did not completely regain its 2008 level.

The Canada-USA region was again in line with the global trend with +5.7% growth.

The various Asian regions performed well in 2010, with very high growth rates at times, as in Central Asia. However, the amounts collected are still very small compared to the size, population and economic vibrancy of a country like India. A similar remark can be made for China where collections remain very low in relation to the country's development.

Oceania recorded one of the strongest growth rates in 2010, due to an increase in public performance royalties and a rise in collections from the digital sector.

COLLECTIONS BY GEOGRAPHICAL AREA

Analysis (2/2)

All the Latin American regions achieved higher collections in 2010. In South America, collections topped €100 million for the first time in Brazil, one of the most dynamic countries in the world in terms of economic growth (like Argentina), while Mexico topped €40 million in Central America.

In Africa, Southern Africa recorded less growth than in 2009 with +10% but consolidated its position as the main sub-region with 73% of the African societies' collections.

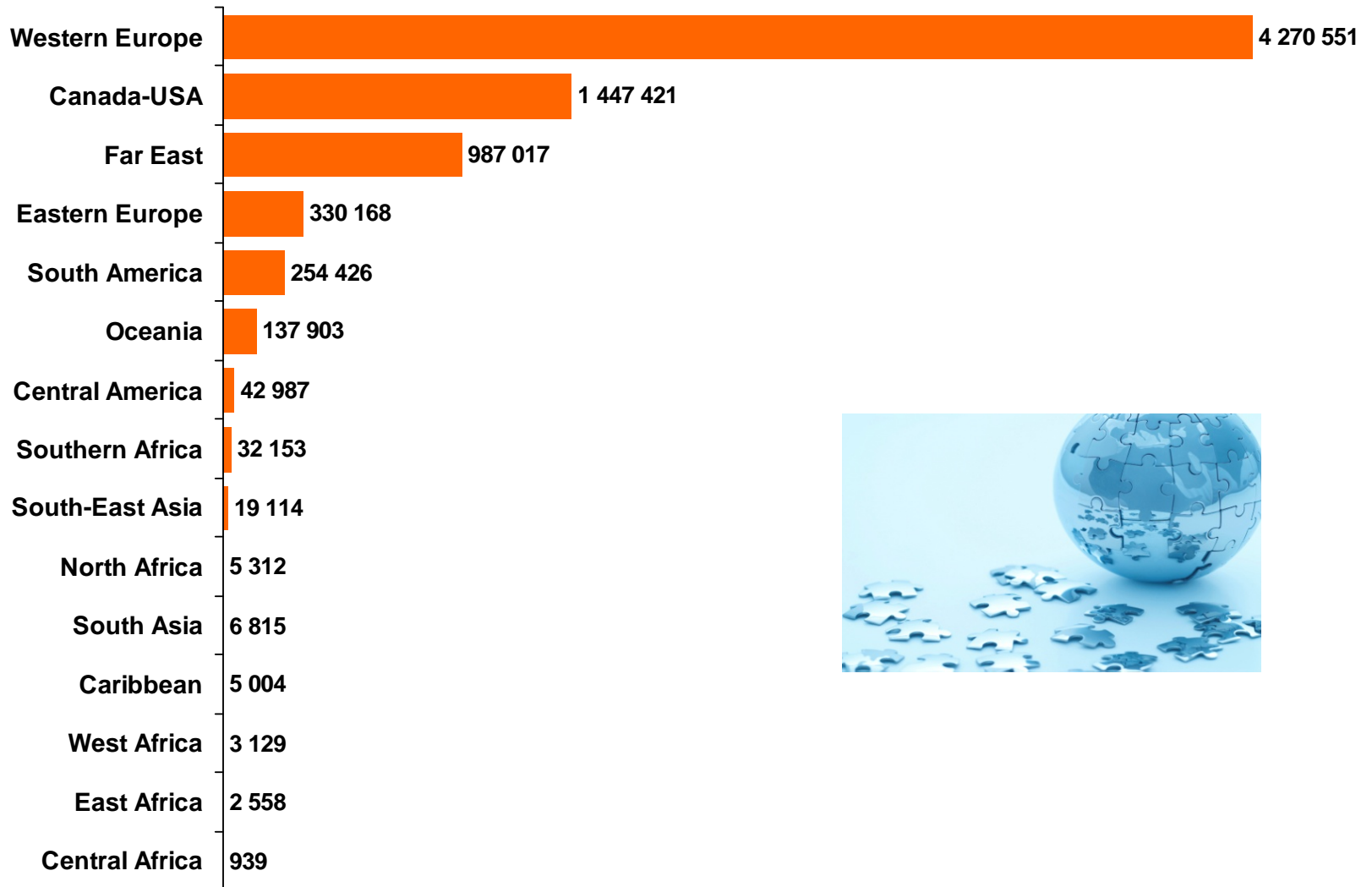
The new indicators introduced this year aims to assess the copyright royalty situation on a comparable basis in the main countries in relation to their economic performance and population size.

Only France (and Denmark with all proper reserves because of NCB's collections) shows a contribution to GDP exceeding 0.5 per thousand in 2010 and can thus be considered an exception in this ranking. This is due to the existence of several big societies managing the various repertoires. The top eight countries, in which collective management makes a significant contribution to their economies, are all in Europe, which is very much overrepresented. Generally speaking, there are many "small" countries in which authors' rights generate significant amounts of royalties. Unlike the following analysis (collections by GDP per capita), this analysis does not provide any weighting based on population size. This explains why a country like the USA does not appear, because it is the world's leading economy.

Relating collections to GDP per head of population, the result is a ranking with homogeneous groups headed by (1) USA, France; (2) Japan, Germany; (3) Italy, United Kingdom; (4) Spain, Argentina, Brazil. We can thus consider that these are **countries in which the activity of collective management of authors' rights is the most significant.**

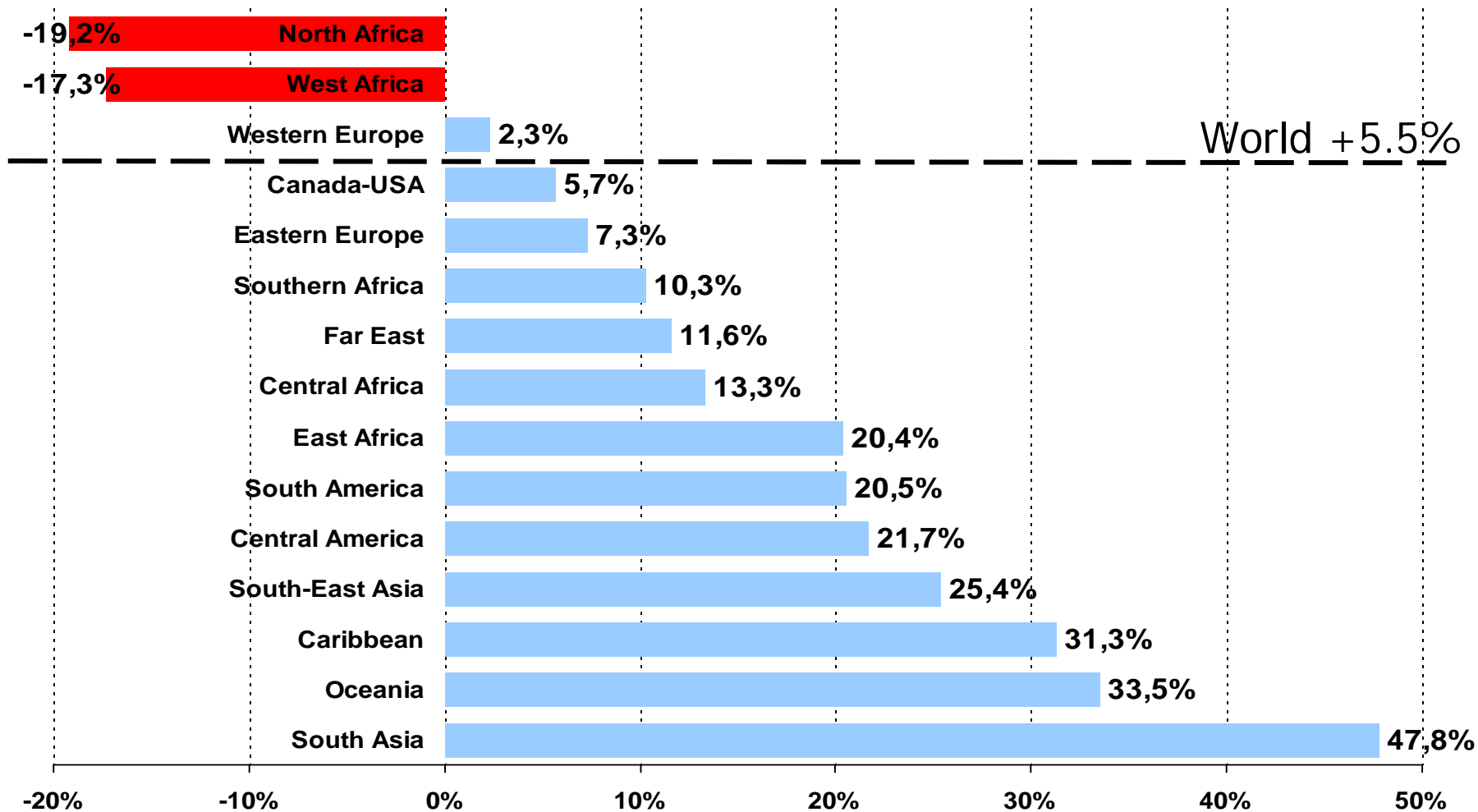
TREND IN COLLECTIONS BY REGION

2010 – World – Thousands of €



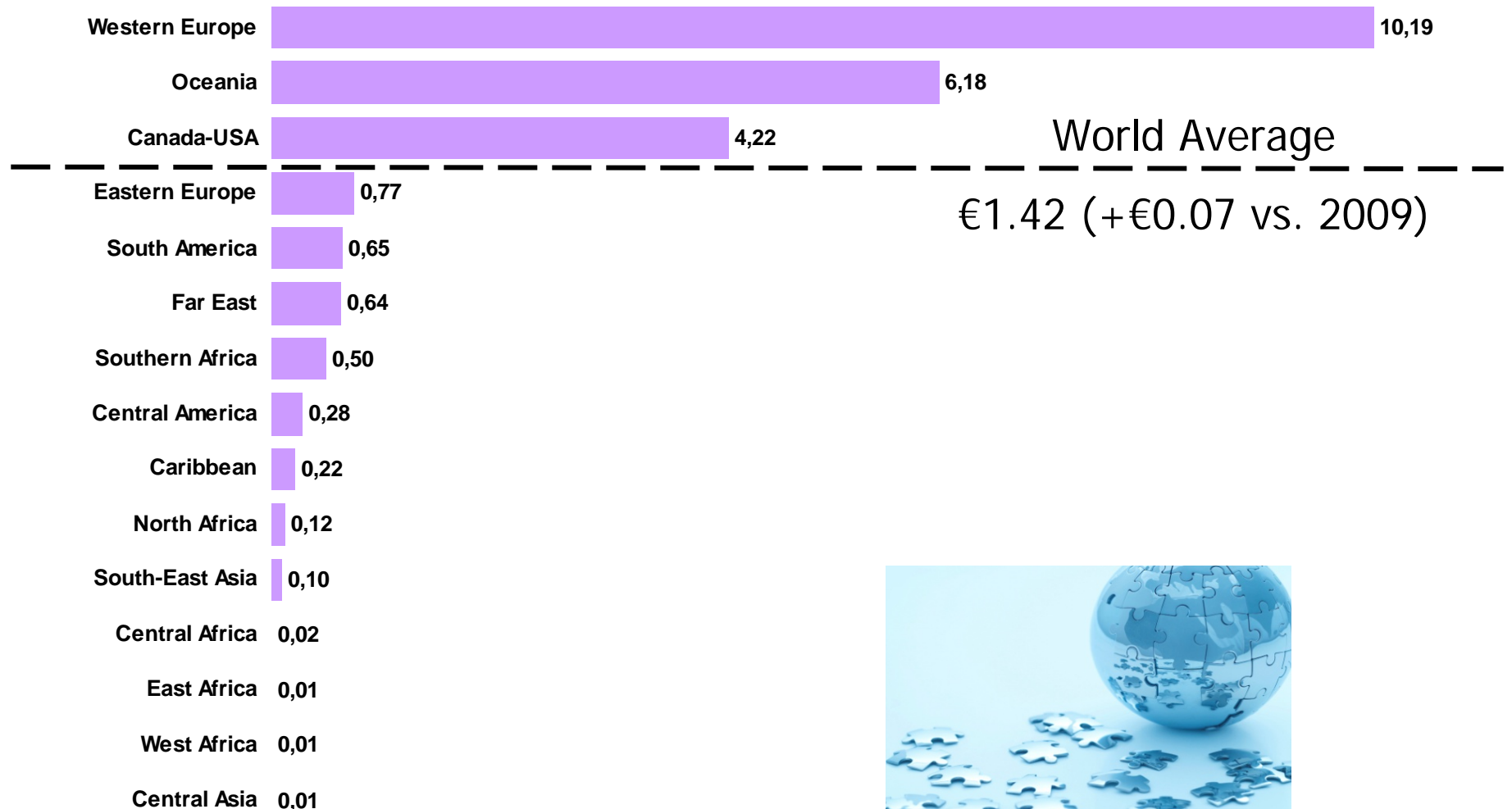
2010/2009 GROWTH RATE BY REGION

World – %



COLLECTIONS PER HEAD OF POPULATION

2010 - By region - €

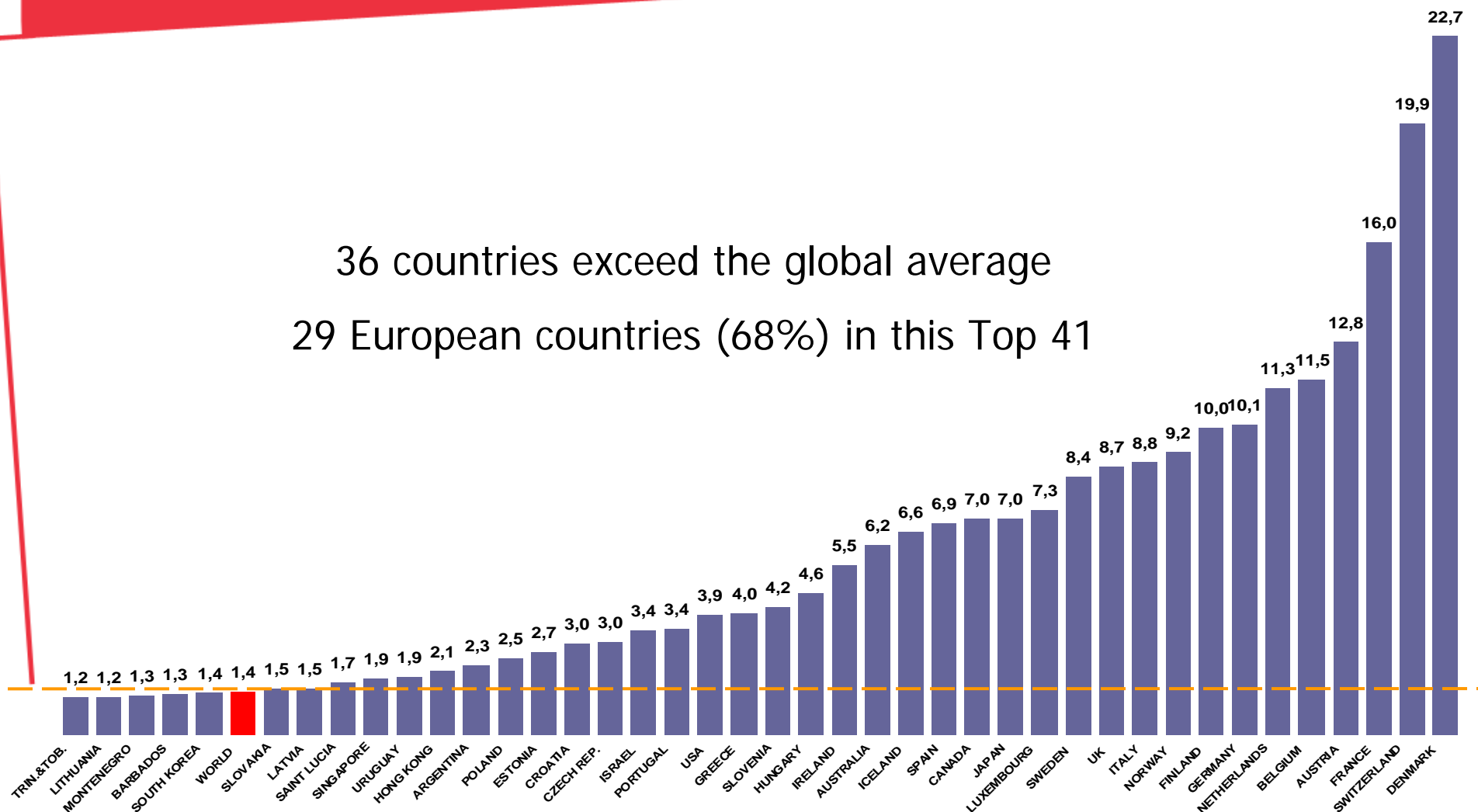


Source of population data: World Bank, IMF

ANNUAL COLLECTIONS PER HEAD OF POPULATION

2010 - € - By country (>€1/per head)

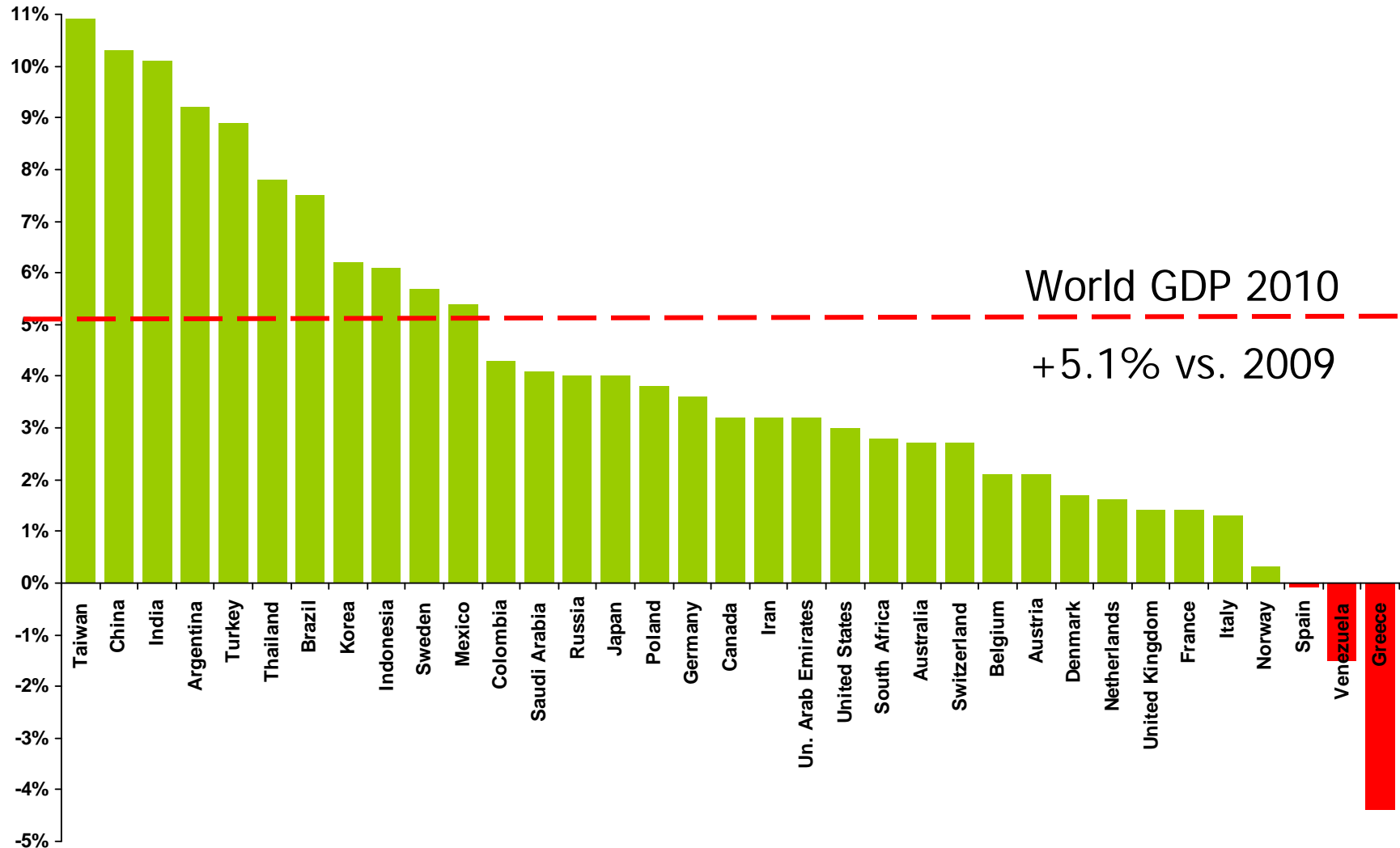
36 countries exceed the global average
29 European countries (68%) in this Top 41



Note: Denmark actually covers NCB's total collections from the 8 Nordic & Baltic countries. If they were split, Denmark would be ranked no.2 behind Switzerland (with approx. €16.8)

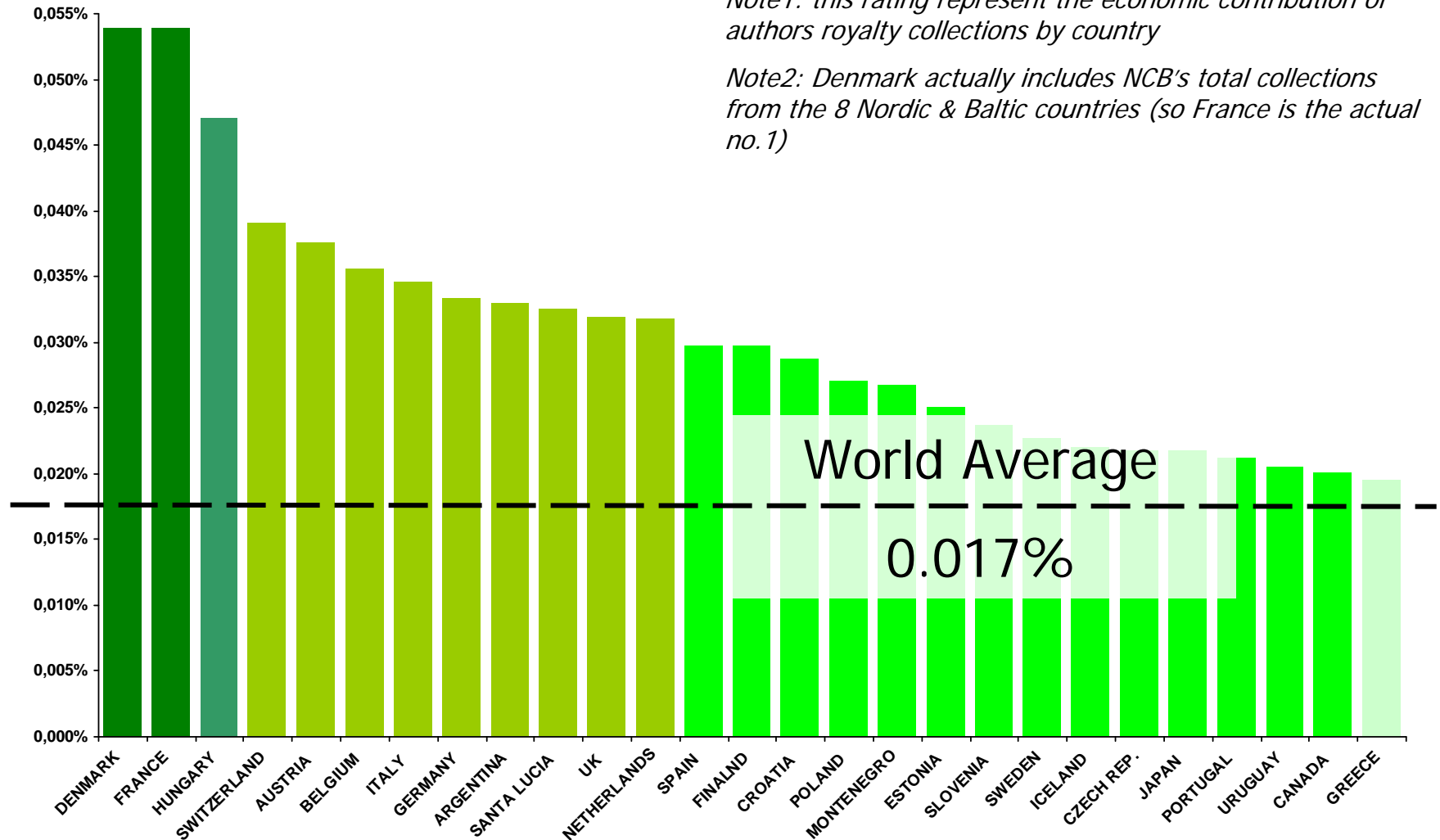
RATE OF CHANGE OF GDP IN THE WEALTHIEST COUNTRIES

2010 - % change compared to 2009



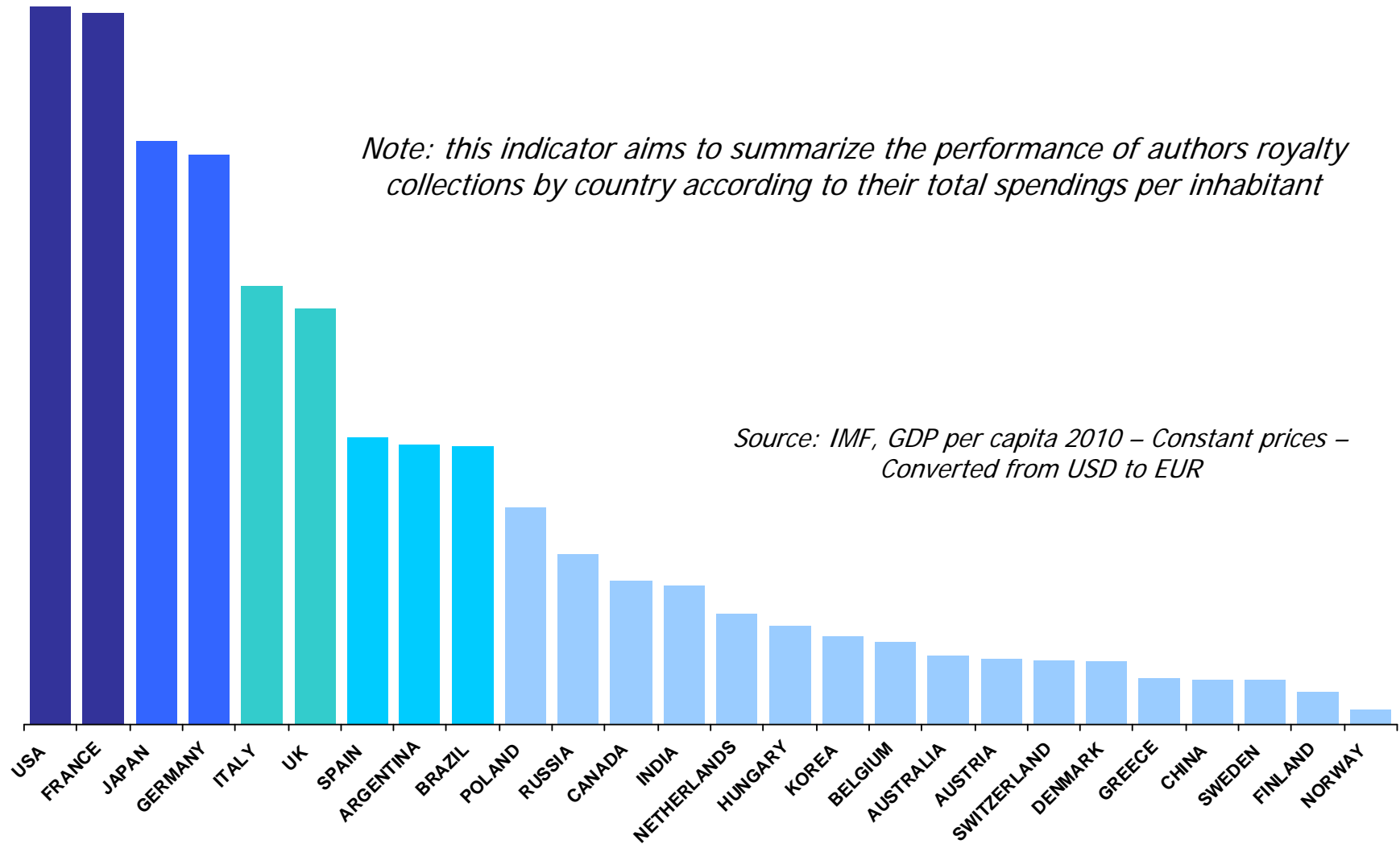
Source: IMF, Real GDP Growth of the Top 35 countries in GDP – Constant prices (National currency)

CONTRIBUTION OF ROYALTIES TO GDP IN MAJOR COUNTRIES 2010 - % (€)



COLLECTIONS PER GDP/CAPITA IN MAJOR COUNTRIES

2010 - €





5. Summary Table of Global Collections from 2008 to 2010

SUMMARY TABLE OF COLLECTIONS

2010 – Thousands of €

2010 - K€	Musical	Non Musical					Total
CISAC Region	Music Total	Visual Arts	Audio-visual	Dramatic	Literary	Others	
Southern Africa	31 149	0	0	35	968	1	32 153
Central Africa	630	0	0	140	127	43	939
East Africa	2 532	0	0	0	26	0	2 558
West Africa	2 933	3	26	83	83	0	3 129
North Africa	4 185	0	257	566	303	0	5 312
Africa Total	41 429	3	284	825	1 507	44	44 092
North America	1 420 988	2 591	2 312	0	21 529	0	1 447 421
North America Total	1 420 988	2 591	2 312	0	21 529	0	1 447 421
Central America	38 375	48	4 206	349	9	0	42 987
South America	225 215	378	14 461	12 652	0	1 719	254 426
Caribbean	4 984	10	10	0	0	0	5 004
Latin America-Caribbean Total	268 575	437	18 677	13 001	9	1 719	302 417
South Asia	6 815	0	0	0	0	0	6 815
South East Asia	19 114	0	0	0	0	0	19 114
Far East	820 851	266	29 295	170	1 456	134 979	987 017
Oceania	135 314	2 590	0	0	0	0	137 903
Asia Pacific Total	982 094	2 856	29 295	170	1 456	134 979	1 150 850
Eastern Europe	263 228	1 926	36 373	24 305	3 750	584	330 168
Western Europe	3 546 462	94 802	405 623	145 524	71 883	6 257	4 270 551
Europe Total	3 809 690	96 728	441 997	169 829	75 633	6 841	4 600 719
World Total	6 522 776	102 615	492 564	183 824	100 134	143 584	7 545 498

SUMMARY TABLE OF COLLECTIONS

2009 – Thousands of €

2009 - K€	Musical		Non Musical				Total
CISAC Region	Music Total	Visual Arts	Audio-visual	Dramatic	Literary	Others	
Southern Africa	26 857	0	0	155	2 149	2	29 163
Central Africa	241	0	0	467	122	0	829
East Africa	2 103	0	0	1	21	0	2 125
West Africa	3 517	4	114	83	56	8	3 782
North Africa	5 600	0	124	587	263	0	6 575
Africa Total	38 317	4	238	1 294	2 611	10	42 475
North America	1 344 595	2 575	2 135	0	19 908	0	1 369 214
North America Total	1 344 595	2 575	2 135	0	19 908	0	1 369 214
Central America	31 865	63	2 765	619	17	0	35 329
South America	189 977	342	9 495	9 695	0	1 692	211 201
Caribbean	3 796	15	0	0	0	0	3 811
Latin America-Caribbean Total	225 637	420	12 260	10 313	17	1 692	250 341
South Asia	4 610	0	0	0	0	0	4 610
South East Asia	15 240	0	0	0	0	0	15 240
Far East	736 932	275	21 715	122	1 187	124 061	884 292
Oceania	102 038	1 238	0	0	0	0	103 276
Asia Pacific Total	858 820	1 514	21 715	122	1 187	124 061	1 007 419
Eastern Europe	252 703	2 032	24 721	22 549	4 057	1 709	307 772
Western Europe	3 415 730	173 255	368 709	135 636	74 953	6 340	4 174 623
Europe Total	3 668 433	175 287	393 429	158 185	79 010	8 050	4 482 395
World Total	6 135 803	179 801	429 778	169 915	102 734	133 813	7 151 843

Remark: in order to maintain consistency with the previous CISAC collection reports, the eventual updates of past collection figures that may have been made later are not mentioned here. However, these updates may be available in the Tools/I&E section on the CISAC website, accessible to CISAC members.

SUMMARY TABLE OF COLLECTIONS

2008 – Thousands of €

2008 - K€	Musical	Non Musical					Total
CISAC Region	Music Total	Visual Arts	Audio-visual	Dramatic	Literary	Others	
Southern Africa	24 542	1	0	153	1 961	3	26 659
Central Africa	152	0	0	467	122	0	740
East Africa	1 719	0	84	0	4	0	1 806
West Africa	3 165	4	136	70	40	0	3 416
North Africa	7 935	0	135	539	242	0	8 851
Africa Total	37 512	5	355	1 229	2 368	3	41 472
North America	1 322 089	2 400	2 237	0	21 898	0	1 348 624
North America Total	1 322 089	2 400	2 237	0	21 898	0	1 348 624
Central America	31 830	0	3 432	795	22	0	36 080
South America	170 418	22	9 530	10 898	0	0	190 867
Caribbean	3 294	5	0	0	0	0	3 300
Latin America-Caribbean Total	205 542	28	12 962	11 693	22	0	230 247
South Asia	3 838	0	0	0	0	0	3 838
South East Asia	13 395	0	0	0	0	0	13 395
Far East	663 190	275	19 675	137	0	104 133	787 410
Oceania	102 718	1 392	0	0	0	0	104 110
Asia Pacific Total	783 141	1 667	19 675	137	0	104 133	908 753
Eastern Europe	276 449	2 111	29 310	21 505	4 331	1 490	335 196
Western Europe	3 495 392	98 671	350 961	153 304	66 955	5 904	4 171 187
Europe Total	3 771 841	100 782	380 271	174 809	71 286	7 394	4 506 383
World Total	6 120 125	104 882	415 500	187 868	95 575	111 530	7 035 479

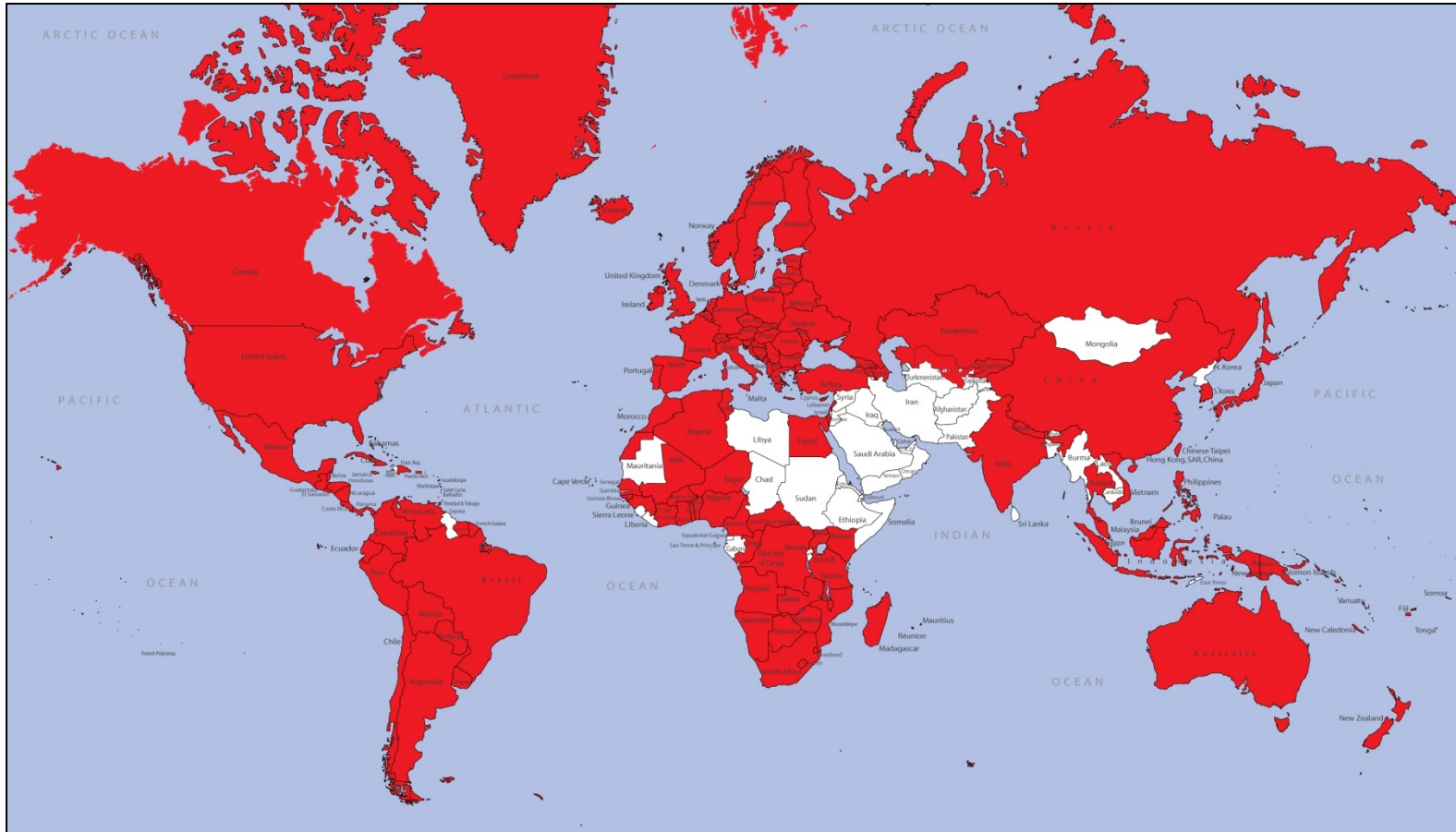
Remark: in order to maintain consistency with the previous CISAC collection reports, the eventual updates of past collection figures that may have been made later are not mentioned here. However, these updates may be available in the Tools/I&E section on the CISAC website, accessible to CISAC members.

6. CISAC

- [Territories covered by CISAC Member Societies](#)
- [List of CISAC Member Societies](#)
- [About us](#)

TERRITORIES COVERED BY CISAC MEMBER SOCIETIES

232 societies from 121 countries



AFRICA

35 authors' societies (1/2)

Sub-Region	Country	Society	Repertoire
SOUTHERN AFRICA	NAMIBIA	NASCAM	MU
	SOUTH AFRICA	DALRO	MU, D, L, AGP
	SOUTH AFRICA	SAMRO	MU
	SOUTH AFRICA	SARRAL	MU
	ZIMBABWE	ZIMURA	MU
CENTRAL AFRICA	ANGOLA	SADIA	MU
	CAMEROON	CMC	MU
	CAMEROON	SOCILADRA	D, L
	CENTRAL AFRICAN REPUBLIC	BUCADA	MU
	CONGO	BCDA	MU, AGP
	DEMOCRATIC REPUBLIC OF CONGO	SONECA	MU, D
	EAST AFRICA	KENYA	MCSK
MADAGASCAR		OMDA	MU, D
MALAWI		COSOMA	MU, DLV
MAURITIUS		MASA	MU
MOZAMBIQUE		SOMAS	MU
SEYCHELLES		SACS	MU
TANZANIA		COSOTA	MU
UGANDA		UPRS	MU
ZAMBIA		ZAMCOPS	MU

MU = Music

AV = Audiovisual

D = Dramatic

L = Literary

AGP = Visual Arts

AFRICA

35 authors' societies (2/2)

Sub-Region	Country	Society	Repertoire
WEST AFRICA	BENIN	BUBEDRA	MU, DLV
	BURKINA FASO	BBDA	MU, DLV, AGP
	COTE D'IVOIRE	BURIDA	MU
	GHANA	COSGA	MU
	GUINEA	BGDA	D
	MALI	BUMDA	MU, DLV, AGP
	NIGER	BNDA	MU, D, L, AGP
	NIGERIA	COSON	MU
	NIGERIA	MCSN	MU
	SENEGAL	BSDA	MU, DLV, AGP
TOGO	BUTODRA	MU, D, L	
NORTH AFRICA	ALGERIA	ONDA	MU, DLV
	EGYPT	SACERAU	MU
	MOROCCO	BMDA	MU
	TUNISIA	OTPDA	MU, D, L

MU = Music

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D = Dramatic

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LATIN AMERICA AND THE CARIBBEAN

49 authors' societies (1/2)

Sub-Region	Country	Society	Repertoire
CENTRAL AMERICA	BELIZE	BSCAP	MU
	COSTA RICA	ACAM	MU, D
	EL SALVADOR	SACIM, EGC	MU
	GUATEMALA	AEI	MU
	HONDURAS	AACIMH	MU
	MEXICO	DIRECTORES	AV
	MEXICO	SACM	MU
	MEXICO	SOGEM	DLV
	MEXICO	SOMAAP	AGP
	NICARAGUA	NICAUTOR	MU
	PANAMA	SPAC	MU
CARIBBEAN	BARBADOS	COSCAP	MU
	CUBA	ACDAM	MU, D
	CUBA	ADAVIS	AGP
	DOMINICAN REPUBLIC	SGACEDOM	MU
	JAMAICA	JACAP	MU
	SAINT LUCIA	ECCO	MU
	TRINIDAD AND TOBAGO	CCL	MU
	TRINIDAD AND TOBAGO	COTT	MU

MU = Music

AV = Audiovisual

D = Dramatic

L = Literary

AGP = Visual Arts

LATIN AMERICA AND THE CARIBBEAN

49 authors' societies (2/2)

Sub-Region	Country	Society	Repertoire
SOUTH AMERICA	ARGENTINA	ARGENTORES	D, AV
	ARGENTINA	DAC	AV
	ARGENTINA	SADAIC	MU
	ARGENTINA	SAVA	AGP
	BOLIVIA	SOBODAYCOM	MU
	BRAZIL	ABRAMUS	MU, D
	BRAZIL	ADDAF	MU
	BRAZIL	AMAR	MU, AV
	BRAZIL	ASSIM	MU
	BRAZIL	AUTVIS	AGP
	BRAZIL	SADEMBRA	MU
	BRAZIL	SBACEM	MU
	BRAZIL	SBAT	D, L
	BRAZIL	SICAM	MU
	BRAZIL	SOCINPRO	MU
	BRAZIL	UBC	MU
	CHILE	ATN	D
	CHILE	CREAIMAGEN	AGP
	CHILE	SCD	MU
	COLOMBIA	SAYCO	MU, D
	ECUADOR	ARTEGESTION	AGP
	ECUADOR	SAYCE	MU
	PARAGUAY	APA	MU, D
	PERU	APDAYC	MU, D
	PERU	APSAV	AGP
	SURINAME	SASUR	MU
	URUGUAY	AGADU	MU, AV, AGP
	URUGUAY	LATINAUTOR	NA
	VENEZUELA	AUTORARTE	AGP
	VENEZUELA	SACVEN	MU, D

MU = Music

AV = Audiovisual

D = Dramatic

L = Literary

AGP = Visual Arts

NA = Information not available: organisations and associations which do not directly manage any repertoire.

NORTH AMERICA

19 authors' societies

Sub-Region	Country	Society	Repertoire
NORTH AMERICA	CANADA	ACCESS COPYRIGHT	L
	CANADA	CARCC	AGP
	CANADA	CMRRA	MU
	CANADA	CSCS	AV
	CANADA	DRCC	AV
	CANADA	SARTEC	AV
	CANADA	SOCAN	MU
	CANADA	SODRAC	MU, AGP
	CANADA	SPACQ	MU
	UNITED STATES	AMRA	MU
	UNITED STATES	ARS	AGP
	UNITED STATES	ASCAP	MU
	UNITED STATES	BMI	MU
	UNITED STATES	DGA	AV
	UNITED STATES	NMPA	MU
	UNITED STATES	SESAC Inc.	MU
	UNITED STATES	The Author's Registry Inc.	L
	UNITED STATES	VAGA	AGP
	UNITED STATES	WGA	D, AV

MU = Music

AV = Audiovisual

D = Dramatic

L = Literary

AGP = Visual Arts

ASIA-PACIFIC

28 authors' societies

Sub-Region	Country	Society	Repertoire
SOUTH ASIA	INDIA	IPRS	MU
	NEPAL	CPSN	MU
	NEPAL	MRCSN	MU
SOUTH-EAST ASIA	BRUNEI DARUSSALAM	BEAT	MU, L
	INDONESIA	KCI	MU
	INDONESIA	PAPPRI	MU
	MALAYSIA	MACP	MU
	PHILIPPINES	FILSCAP	MU
	SINGAPORE	COMPASS	MU
	THAILAND	MCT	MU
	VIET NAM	VCPMC	MU
	FAR EAST	CHINA	MCSC
HONG KONG		CASH	MU
JAPAN		APG-Japan	AGP
JAPAN		JASRAC	MU, D
JAPAN		WGJ	AV
MACAU		MACA	MU
REPUBLIC OF KOREA		KOMCA	MU
REPUBLIC OF KOREA		KOSA	D, L, AGP
REPUBLIC OF KOREA		SACK	AGP
TAIWAN, CHINESE TAIPEI		COLCCMA (formely COLCIA)	L
TAIWAN, CHINESE TAIPEI		MUST	MU
OCEANIA	AUSTRALIA	AMCOS	MU
	AUSTRALIA	APRA	MU
	AUSTRALIA	ASDACS	AV
	AUSTRALIA	AWGACS	AV
	AUSTRALIA	CAL	AGP
	AUSTRALIA	VISCOPY	AGP

MU = Music

AV = Audiovisual

D = Dramatic

L = Literary

AGP = Visual Arts

EUROPE

101 authors' societies (1/4)

Sub-Region	Country	Society	Repertoire
CENTRAL AND EASTERN EUROPE AND CENTRAL ASIA	ALBANIA	ALBAUTOR	MU, AV
	ARMENIA	ARMAUTHOR	MU, D
	AZERBAIJAN	AAS (formely MPRMWA)	MU
	BELARUS	NCIP	MU, D
	BOSNIA AND HERZEGOVINA	SQN	MU
	BULGARIA	FILMAUTOR	AV
	BULGARIA	MUSICAUTOR	MU
	BULGARIA	TEATERAUTOR	D
	CROATIA	HDS-ZAMP	MU
	CZECH REPUBLIC	DILIA	L, AV
	CZECH REPUBLIC	GESTOR	AGP
	CZECH REPUBLIC	OSA	MU
	ESTONIA	EAU	MU, D, AV, AGP
	GEORGIA	GCA (formely SAS)	MU, DLV
	HUNGARY	ARTISJUS	MU, L
	HUNGARY	FILMJUS	AV
	HUNGARY	HUNGART	AGP
	KAZAKSTAN	KazAK	MU, D, L
	KYRGYZSTAN	KYRGYZPATENT	MU, D
	LATVIA	AKKA-LAA	MU, DLV, AGP
	LITHUANIA	LATGA-A	MU, DLV, AGP
	MACEDONIA (FYROM)	ZAMP - Macedonia	MU
	MOLDOVA	AsDAC	MU, DLV
	MONTENEGRO	PAM CG	MU
	POLAND	ZAIKS	MU, D, L
	POLAND	ZAPA	AV

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EUROPE

101 authors' societies (2/4)

Sub-Region	Country	Society	Repertoire
CENTRAL AND EASTERN EUROPE AND CENTRAL ASIA	ROMANIA	UCMR-ADA	MU
	RUSSIAN FEDERATION	RAO	MU, D, AGP
	RUSSIAN FEDERATION	UPRAVIS	AGP
	SERBIA	SOKOJ	MU
	SLOVAKIA	LITA	DLV, AGP
	SLOVAKIA	SOZA	MU
	SLOVENIA	SAZAS	MU, AV
	SLOVENIA	ZAMP Association of Slovenia	L
	TURKEY	MESAM	MU
	TURKEY	MSG	MU
	TURKEY	SETEM	AV
	TURKEY	SINEBIR	AV
	UKRAINE	UACRR	MU, D, L
	UZBEKISTAN	GAI UZ	MU, AGP
WESTERN, SOUTHERN AND NORTHERN EUROPE	AUSTRIA	AKM	MU
	AUSTRIA	AUSTRO-MECHANA	MU
	AUSTRIA	LITERAR-MECHANA	L
	AUSTRIA	VBK	AGP
	AUSTRIA	VDFS	AV
	BELGIUM	GESAC	NA
	BELGIUM	SABAM	MU, DLV, AGP
	BELGIUM	SOFAM	AGP
	DENMARK	COPY-DAN BILLEDKUNST	AGP
	DENMARK	KODA	MU
	DENMARK	NCB	MU

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AGP = Visual Arts

NA = Information not available: organisations and associations which do not directly manage any repertoire.

EUROPE

101 authors' societies (3/4)

Sub-Region	Country	Society	Repertoire
WESTERN, SOUTHERN AND NORTHERN EUROPE	FINLAND	KIRJAILIJA	D, L
	FINLAND	KOPIOSTO	AV
	FINLAND	KUVASTO	AGP
	FINLAND	TEOSTO	MU
	FRANCE	ADAGP	AGP
	FRANCE	SACD	D, AV
	FRANCE	SACEM	MU
	FRANCE	SACENC	MU
	FRANCE	SCAM	L, AV, AGP
	FRANCE	SESAM	NA
	FRANCE	SGDL	L
	FRANCE	SNAC	NA
	FRANCE	SPACEM	MU
	GERMANY	BILD-KUNST	AV, AGP
	GERMANY	GEMA	MU
	GREECE	AEPI	MU
	GREECE	SADH	D
	GREECE	SOPE	D
	HOLY SEE (Vatican City State)	UFFICIO LEGALE	NA
	ICELAND	STEF	MU
	IRELAND	IMRO	MU
	IRELAND	IVARO	AGP
	IRELAND	SDCSI	AV
	ISRAEL	ACUM	MU, L
	ISRAEL	TALI	AV
	ITALY	SIAE	MU, DLV, AGP

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L = Literary

AGP = Visual Arts

NA = Information not available: organisations and associations which do not directly manage any repertoire.

EUROPE

101 authors' societies (4/4)

Sub-Region	Country	Society	Repertoire
WESTERN, SOUTHERN AND NORTHERN EUROPE	LUXEMBOURG	SACEMLUXEMBOURG	MU
	NETHERLANDS	BUMA	MU
	NETHERLANDS	LIRA	DLV
	NETHERLANDS	PICTORIGHT	AGP
	NETHERLANDS	STEMRA	MU
	NETHERLANDS	VEVAM	AV
	NORWAY	BONO	AGP
	NORWAY	TONO	MU
	PORTUGAL	SPA	MU, DLV, AGP
	SPAIN	DAMA	AV
	SPAIN	SGAE	MU, D, AV
	SPAIN	VEGAP	AGP
	SWEDEN	BUS	AGP
	SWEDEN	STIM	MU
	SWITZERLAND	PROLITTERIS	L, AGP
	SWITZERLAND	SSA	D, AV
	SWITZERLAND	SUISA	MU
	SWITZERLAND	SUISSIMAGE	AV
	UNITED KINGDOM	ACS	AGP
	UNITED KINGDOM	ALCS	L, AV
UNITED KINGDOM	DACS	AGP	
UNITED KINGDOM	DIRECTORS UK	AV	
UNITED KINGDOM	MCPS	MU	
UNITED KINGDOM	PRS FOR MUSIC	MU	

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CISAC, Serving Authors Worldwide

Presided over by Robin Gibb – legendary singer and songwriter of the Bee Gees – and Hervé Di Rosa – French visual artist and painter, co-founder of the artistic movement “Figuration libre”, CISAC – the International Confederation of Societies of Authors and Composers – aims at increasing both the recognition and protection of creators’ rights worldwide.

In a globalised and digital world, CISAC’s main missions are to reinforce the international network of copyright societies, to be their spokesperson in all international debates and to reassert authors’ inalienable right to live by their creative work.

With 232 authors’ societies from 121 countries as its members, CISAC indirectly represents around 3 million creators and publishers of artistic works in all genres including music, drama, literature, audiovisual, photography and the visual arts.

As an international organisation, CISAC’s fundamental role is to enable authors’ societies to seamlessly represent creators across the globe and, in particular, to assist them in ensuring that royalties flow to authors for the use of their works anywhere in the world. In 2010, the royalties collected by CISAC's member societies in their respective national territories topped €7.5 billion.

Founded in 1926, CISAC is a non-governmental, not-for-profit organisation with worldwide headquarters in France and regional offices in Chile, Hungary, Singapore and South Africa.

www.cisac.org – twitter.com/CopyrightSummit



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**Previous reports on collections
are available on the CISAC Website:
www.cisac.org**